

The TJE American

Business

magazine

Patrick A. Finn

How hard work and determination built his $3 million construction company

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The TJE American Business magazine

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Our business analysts and consultants are the most talented in the industry and will provide your company with a roadmap for profitability and overall success. GR, GPS, CBS and STA are only for those business owners who want to achieve excellence. Similar to a top trainer for a professional athlete, our senior business analysts and consultants will push you to become the best you can be. We refuse to accept anything less for you and your business. That being said, you must be fully committed to success before we can commit to you. With your cooperation, we will show you how to build a better business and steer you towards success and profitability.

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Our policy requires that we perform a business analysis prior to engaging clients in consulting projects. The business analysis is performed by an expert who has performed hundreds of onsite company analyses in the past. Ethical business analysts are trained to discover problems, determine how to solve them and prioritize those that can provide the business owner a significant return on investment. Many business owners, as well as boards of directors, engage our analytical services for a checkup for the same reason a person visits the doctor for a physical. During the exam, we evaluate all the components of the client's business.

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So, you want to be an Entrepreneur?

SCREW UP FIRST.

—Ryan Alovis



"If you're going through hell, keep going…" There could not be a more fitting phrase to sum up the experiences that led me to start my current venture, ArkNet Media, not to mention the period of time when I was getting my business off the ground.

As a young, bright-eyed student at Indiana University, I thought the world was my oyster and that if I had an idea, there was literally no way that it could fail. I was so wrong. I've had the entrepreneurial bug ever since I was a kid—was bitten by the same bug that bit my father. In college, I was promoting parties at nightclubs and making more money in one summer than most adults made in a year. During the tail end of my college experience, I started a cleaning service and then another business that hired photographers on college campuses across the country to snap college kids partying at bars. Both businesses failed. It wasn't for a lack of passion, but rather because it was too much, too quick without the necessary preparation and resources to properly run and maintain a successful business.

I graduated college in 2005 and had already personally bankrupted two companies. Then in 2006, I started ArkNet Media, where I quickly learned that launching a business is not for the faint of heart. It's a real commitment that extends way beyond the boundaries of normalcy. More often than not, it's taxing on physical, mental, financial, and emotional levels. In the initial stages, the moments of fear and frustration totally outweigh those of confidence and happiness.

In the early months, I had nothing—no servers, no operations, no staff, and no branding. My only choice at the time was to outsource everything. The fact that I was starting an e-commerce company with almost no capital meant many sleepless nights on the phone with developers in India working out the kinks and making sure the website was fully functional and user friendly. Although the company today has grown rapidly since its meager beginnings, getting there afforded me a valuable lesson in commitment and patience that has stuck with me throughout my career.

Ryan Alovis is the founder and CEO of ArkNet Media, an interactive agency headquartered in Garden City, New York, which owns and operates a series of successful e-commerce companies, including MagazineDiscountCenter.com, LensDirect.com, BirthdayPartyBooker.com, and YourSecureHome.com

While I do not claim to be an expert businessman, I do think I can offer some sage wisdom to people just starting out. Here are some tips and lessons I learned along the way.

1. Your business is like a relationship:

I liken starting your own business to entering into a new relationship or a marriage. For starters, chemistry is essential. Beyond that, you need to be certain you are ready to take on the challenges that lie ahead and that you are dedicated enough to put in the work. Like any relationship, starting a business has a honeymoon stage. Prepare yourself for when the excitement ends and the roller coaster ride begins.

2. Learn from the masters:

It's not wise to jump in feet first without having a clear set path. Remember, you can be the smartest person in the world but not know the first thing about starting a business. Do your research. Attend seminars, read books written by successful business owners (one must-read that made an impact on me is *Winning* by Jack Welch). Sign up for workshops where you can hear firsthand from successful entrepreneurs. They obviously did something right; take their advice when mapping out your business plan.

3. Looking to partner up?

If you are looking to partner up, make sure that you choose wisely. What does your potential partner bring to the table? Is your partner as committed as you are to putting in the hours and doing the work? You don't want to be in a situation where they are not pulling their weight, leaving you to do all of the heavy lifting. If you're going at it solo, kudos to you, but just make sure that you are prepared to do it alone. A bad partner is enough to sink your ship.

4. Use your time wisely

There are twenty-four hours in a day, and still it never feels like enough time to get everything done. For this reason, it's absolutely essential for new entrepreneurs to be smart when it comes to using and managing their time. Don't waste your time on anything (plans with people you don't like, social networking sites that will eat up hours of your day, and most importantly, people who don't believe in you or are simply trying to hold you back).

5. Get organized

Organization can pave the way to success. When starting a new business, there are bound to be several moving parts on any given day. My advice: track everything, keep receipts, have a plan of attack, and map out your day. If you're feeling overwhelmed, make a to-do list immediately. With all of the technology available, today there's no excuse for being disorganized or letting anything fall through the cracks. Some of the apps/tools that I use on a daily basis are MINT, Evernote, and WunWun.

6. Use the fear of failure as motivation for success

Make a list of your strengths… and your weaknesses. Nobody is perfect, and the first step to being true to yourself—both in your personal life and in business—is admitting you have flaws and that you're not invincible. Insecurities and fear of failure will only hold you back from achieving your true potential. Facing these fears head on from the get go will increase your chances of succeeding. If things don't work out, understand that going back to the drawing board does not mean that you have given up.

7. Invest in your team

The moment you're out of the red and you're starting to see money coming in, take steps towards investing in the most important part of your business—your employees. Remember that talent is at the heart of every business. The people who work for you day in and day out can make or break what you have worked so hard to create. Choose wisely, mentor often, lead by example, and always reward a job well done.

8. Find what gets you going

What gets your creative juices flowing? What propels you to take the bull by the horns and bang out your daily tasks? Does that early morning run give you the motivation you need to take charge of your day? For me, I found that working out relieved stress and allowed me to focus on the items that needed my attention most. Likewise, music helps me concentrate and gives me the strength to find solutions. Walk into my office on any given day and you're likely to hear the theme from Rudy, any of the Rocky movies, or other tracks that'll get my heart beat racing.

9. Patience is a virtue

Remind yourself that Rome was not built in a day, and your business likely won't be either. Whether it's a start-up or a large global corporation, a great business takes much more than a great idea: it takes time, perseverance, and the will to succeed. Be patient with corporate red tape by reminding yourself that while you answer to yourself and yourself alone, the person you are trying to reach may answer to a dozen different departments. Always put yourself in the other person's shoes to see where he or she is coming from before you rush to make a judgment.

10. Stop and take time to smell the roses

While it may not always be easy, realize that there is a reason why you are doing this. Take a step back and look at the opportunity that you are being given. The future is wide open and it's yours for the taking. When the only person who can say no to you is the person staring back at you in the mirror, anything is possible. Finally always remember to be confident while also remaining humble. Don't take yourself too seriously, and always find time to laugh.



It's been an amazing journey over the past seven years. There have been ups and downs, good days and bad days, and when I ask myself if I would do it all again, the answer is always a resounding yes. I would not be who I am today if I had not taken that risk. While I'm not claiming to have all of the answers, these are some of my Cliff Notes, and hopefully they'll be of use to you. Ultimately though, this is your story, and you have to write it yourself.


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6 steps to bolstering your business by Sharpening your leadership vision

—Samantha Howland



Most business owners understand the need for strategy when it comes to leading their organizations toward a successful future, especially in today's business landscape where uncertainty reigns across all industries. The ability to think strategically and navigate change effectively is key to creating a sustainable organization. Yet true strategic thinking and planning skills are a rarity among company leaders today, who are often consumed with the present or focused on near-term goals. In fact, according to Chief Executive Magazine, seven out of ten leaders are not strategic.

Despite the widely accepted importance of strategic leadership, its actual practice is clouded with ambiguity, leaving many business owners wondering what it actually means to be strategic and how they can strategically lead their own companies. The result? A leadership gap of epidemic proportions that has shortened the average lifespan of corporate entities to just 40 years.

The ability to think strategically is not instinctively developed in the business world. On the contrary, it is a skill that must be actively cultivated and purposefully practiced. Above all, this requires a framework for developing strategic leadership skills, which prompted Decision Strategies International to develop The Six Key Elements of Strategic Thinking, a proven guide designed to help leaders of small, medium-sized and large organizations alike hone their strategic leadership abilities. This framework was developed based on more than two decades of experience training strategic leaders and conducting targeted research with more than 20,000 professionals from 6,000 organizations in 176 countries.

The Six Key Elements of Strategic Thinking include the ability to: anticipate, challenge, interpret, decide, align, and learn. When mastered and used together, these skills enable leaders to help their organizations both adapt and succeed in a world of uncertainty. Each of these six complementary elements encapsulates essential behaviors and practices that allow business owners to steer their companies toward sustainability and growth amid an ever-changing and increasingly competitive marketplace. Let's look at each one in turn:

1 Anticipate: Rather than focusing on what is directly ahead, leaders must anticipate disruption by looking for game-changing information at the periphery, searching beyond current boundaries and building networks to help them scan the horizon.

2 Challenge: It is easy for leaders to rely on tried and true solutions, especially when disruption pushes them to the boundaries of their comfort zone. Strategic leaders repeatedly challenge the old way of doing things and encourage different — even contrarian — points of view.

3 Interpret: Anticipating change and challenging conventions surfaces valuable facts and figures that must be thoughtfully analyzed to yield actionable results. Strategic leaders compare and contrast these data points in unconventional ways and test multiple hypotheses before arriving at conclusions.

4 Decide: Strategic leaders use process and discipline to arrive at a good enough position to make a timely decision and avoid missed opportunities due to analysis paralysis. They tend to frame the decision and approach; balance speed, rigor, quality, and agility; and take courageous stands, even with incomplete information.

5 Align: Strategic leaders must know how and when to align divergent agendas to work toward a common goal while welcoming diversity. Actively encouraging open dialogue among stakeholders and addressing misalignment helps build trust and reach consensus.

6 Learn: Successful leaders embrace learning in its many forms, whether it is through interactions with various customers, partners, and market segments; through experimentation by way of innovation; or through ongoing check-in points and after-action debriefs to surface early indicators of success and failure. Leaders can improve performance and decision-making when armed with these insights, which are both key to long-term strategy.

Using this framework, we created The Strategic Aptitude Assessment, a tool that enables leaders to identify and improve their strategic approach through actionable feedback for development. By evaluating their strengths and weaknesses in each area, leaders can work toward strengthening their strategic capabilities and can better shepherd their companies to seize profitable opportunities and navigate around complexities and challenges.

In the past, business owners were able to succeed by being great at what they knew best, but today's leaders must have a more macro, systems-wide approach to leadership across a variety of areas within the organization and beyond. This requires a multi-faceted perspective and a skill set that leaders can achieve by mastering the art and science of strategic thinking.

Take the Strategic Aptitude Assessment today to see how www.decisionstrat.com/insights/strategic-aptitude-assessment/.

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Business owners are bombarded with one key theme surrounding the U.S. economy: **STRUGGLE.**

Business owners are bombarded with one key theme surrounding the U.S. economy: struggle. However, if we look beyond the news reports and pessimism, we can find bright spots and areas of growth. American manufacturing is making a comeback—a comeback large enough to reshore jobs and garner massive public support.

As domestic manufacturers, we can utilize this trend to properly position our products, increase profit margins, and widen consumer bases. We can tap into the conscious consumer movement. Likewise, service businesses can gain customers by marketing their usage of American goods and highlighting their support for American manufacturing. Simply put, the majority of Americans believe that buying domestic is important, and they do not necessarily expect the entire product to be made in the USA.

Corporations have taken notice. Apple, a company notorious for outsourcing production to China, recently released a marketing campaign that touted its products as "designed in California." Walmart recently announced a 10-year, $50 billion initiative to increase American products, even though this increase only accounts for 1.5 percent of their inventory.

The shifts in the marketing plans of multibillion-dollar international corporations highlight the magnitude of consumer interest. Whether your business produces 100 percent "Made in the USA" certified products or simply uses items assembled in America, you can utilize preexisting market research to tap into the "buy American" trend, understand your consumer base, and increase profits.

Americans, regardless of gender, age, income, or political affiliation, overwhelmingly support buying American made products. A survey conducted by American Certified of over 1,050 people found that 80 percent of Americans believe that purchasing domestic products is important to them. In a similar survey focusing on the Made in America movement, the Consumer Reports National Research Center found that 78 percent of Americans would rather buy a domestic product than an identical import, and 92 percent of respondents were more likely to buy a product from a company that supported the local community.

If you are a business owner manufacturing an American made product, it is important that you market your product as such because your domestic consumer base cares. However, prior to marketing, you must understand the federal guidelines. Marketing Made in America has specific parameters that are vague and often confusing.

The Federal Trade Commission (FTC) regulates the "Made in the USA" standard. This is the most common and recognized standard. "Made in the USA" means that all or virtually all of the product was produced in the USA. The FTC does not preapprove this claim, so no prior certification is required. However, there are also private certifiers that register products as American made.

The Apple and Walmart campaigns provide substantial evidence regarding the halo effect of Made in America. Apple's willingness to spend millions of dollars on a marketing plan that solely focuses on American design highlights the magnitude of this consumer trend. Consumers not only value 100 percent domestic production but also value companies that purchase American products or partially produce their products domestically. For the many products that are partially made in America, as a manufacturer, you have the ability to insert qualified claims onto your products. For example, a product can state "assembled in USA" or "60 percent produced in USA." Even if only one-third of your products are American made, own it.

We understand that many consumers prefer American manufacturing, but we can delve further. By utilizing demographics, business owners can pinpoint motivations, increase customer loyalty, and further profit from the conscious consumer movement. A business must know the demographics of its current and potential customer bases. Demographics are simply the customers and their external characteristics. Demographic information includes (but is not limited to) age, annual income, race, number of children, political affiliation, and occupation.

While Americans support domestic manufacturing across demographic lines, certain niches are more likely to put strong emphasis on this issue. Most significant is the statistical difference between age groups. A Harris Interactive poll found that 75 percent of Americans over 55 years old are more likely to buy a product that emphasizes Made in America compared to 44 percent of 18–34 year olds. A recent Gallup poll provided similar sentiment, stating that 61 percent of Americans over 65 years of age went out of their way to buy American compared to 20 percent of 18–29 year olds.

Even if only one-third of your products are American made, OWN IT.

The gap only widens with the inclusion of political beliefs. According to an American Certified study, conservatives over 60 years old are the most likely to agree that buying American is important to them (93 percent), while liberals between the ages of 18 and 29 are the least likely (63 percent).

The reasons for buying American differ as well: 68 percent of the polled conservatives over 60 years old stated that they bought American to support domestic jobs, while only 40 percent of the young liberals polled bought American to support jobs. However, young liberals are much more likely to purchase American to support the ethical treatment of workers and for environmental concerns compared to their older, conservative counterparts.

But what does this data mean for your business? It simply means that you must understand your demographics to market effectively. If your customer base has a strong percentage of conservatives or Baby Boomers, you may want to emphasize the role domestic manufacturing plays in job creation. Your business creates American jobs. Your business supports the American economy. Likewise, if your consumer base is largely liberal or young, emphasize the ethical treatment of your employees or market on behalf of your sustainable practices and environmentally friendly business.

A huge portion of the American population is reinvigorated to purchase American, but the reasoning behind the purchases varies significantly. A business must always cater its marketing to the consumer base. Marketing American manufacturing is no different. Conservatives and Baby Boomers purchase American to support American jobs and the domestic economy. Generation Y purchases American goods for labor rights, environmental concerns or branding. Market accordingly.

Where applicable and whenever possible, your business should take pride in American quality and connect with the growing number of consumers who believe in the importance of domestic manufacturing. The American conscious consumer is ready for your product. Understand your demographics, market ferociously, and utilize your company's unique qualities and traits. Buying American is in; it's time to capitalize.

Marvin Weinberger is a serial entrepreneur. His company, Innovation Factory (www.innovationfactory.com) manufactures hand tools, including the Trucker's Friend. He recently launch American Certified (www.americancertified.com) a one-stop shop, featuring more than 500,000 USA made products.

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Solving Common SMB *pain points* with Cloud & Tablet Technology

—Aaron Weiss

Increasing efficiency for small and medium-sized business (SMB) means eliminating unnecessary processes in order to maximize available budgets and resources. Today, SMBs are moving away from paper-intensive processes by digitizing office documents to improve everyday workflow and business operations.

SMBs are increasingly incorporating cloud-based solutions to enhance the digitization of their businesses. Acting as an extension of the cloud, tablets are among the top devices facilitating the shift to the digital office. In fact, last year, companies with fewer than 1,000 employees saw almost double-digit growth in tablet usage and, by 2015, 82.1 million people will own a tablet in the United States.

SMBs are present in almost every industry, including but not limited to: healthcare, insurance, legal, and financial services. Although each of these industries has unique qualities and differentiating business demands, all SMBs share a common underlying thread—the need for easy-to-use, manageable technology solutions to keep their businesses afloat and thriving.

The day-to-day life for every SMB professional is hectic because most are faced with daily tasks such as scheduling appointments, managing office finances, and everyday business operations. But in the midst of managing administrative responsibilities, disorganization, security issues, and time management often become pain points for practices. Below are the major pain points that SMBs commonly experience and how these problems are solved with tablets and the cloud.

Document overload

For most SMBs, owners and employees are often responsible for many different documents, including customer service documentation, business plans, and financial paperwork. These documents are often paper-based and require onsite storage, which, if filed in a standard five-drawer filing cabinet, can cost businesses upwards of $2,000 to own and manage per year. The cost to store and manage documents is especially evident in paper-intensive offices such as office-based physician practices and legal firms that need to keep in-depth, individual files and records for each client or patient. SMBs can save money by utilizing the cloud and digitizing their documents securely through cloud-based document management solutions.

> One of the greatest benefits of tablets and the cloud is the ability to access, capture and upload documents or photos anytime, anywhere.

In addition to costs associated with storing paper-based files, another disadvantage is the risk associated with documents being misplaced by human error or ultimately lost during a natural disaster. Single copies of documents stored at one location are at risk of being stolen or destroyed during unexpected break-ins, fires, and even floods. SMBs should store copies of documents in the cloud so that in the case of a disaster, files are backed up and can be easily recovered.

Cloud-enabled tablets can also provide instant access to digital documents, whether in the office or on the road, eliminating the need to physically search for paper files and allowing users to review large chunks of data.

Demand for mobility

With a limited number of staff available to handle multiple responsibilities, small businesses need to supply their teams with technology to meet the demands of today's mobile workforce. Although the demand for mobility varies in different industries, it is apparent that professionals in all industries benefit from the use of mobile devices at work. For example, according to recent reports, four out of five practicing physicians use at least one smartphone, tablet, laptop, or a combination of devices at the point of care. Concurrently, 89 percent of attorneys have reported using a smartphone for law-related tasks while away from their primary workplace.

Similar to the initial introduction of the smartphone to the office, tablets are the latest devices that are making the shift from an optional device to a business necessity in the office environment. One of the greatest benefits of tablets and the cloud is the ability to access, capture and upload documents or photos anytime, anywhere. According to recent reports, 58 percent of mobile workers expect to rely more on tablets this year. With the ability to connect to the cloud and other business networks at any time, mobile access drives business efficiency outside of the office. By providing business teams with cloud-enabled tablets, employees can be more productive while away from their desks, whether in the board room or boarding a plane.

Managing multiple workflows

Instead of overextending internal resources, SMBs typically work with outside vendors,



contractors and third parties to meet different customer requests. The cloud supports efficient collaboration between SMBs and outside vendors by allowing secure network access to enhance file sharing capabilities. To protect both the business and the customer, SMBs have the option to share specific selected network folders with certain vendors, instead of allowing access to the entire business network.

Although outsourcing enhances productivity for SMBs, maintaining version control through the constant sharing of files through email and other collaboration tools can be a time-wasting burden. According to research from Gartner, knowledge workers waste 20–30 percent of their working hours managing document-based information. Certain cloud solutions enable updated document versions to be shared automatically to authorized network users or quickly via email.

Cloud solutions can also automatically sync across multiple devices, making it convenient for tablet and mobile users to access files from anywhere, at any time. To further reduce wasted time, it is important to look for cloud solutions that provide powerful search engines that will not only find files by name or metadata, but also by full text search of the documents.

Regardless of industry specifics, all small to medium-sized businesses encounter similar pain points. By using cloud-enabled technology, SMBs can address the underlying issues of handling too many documents, mobile access, and collaboration to provide customers with the best service possible.

Aaron Weiss is the director of marketing for LaserJet and Enterprise Solutions in the Printing and Personal Systems Group of Hewlett-Packard. Aaron's organization is responsible for driving the product and marketing strategy for a portfolio of document management, workflow, capture, mobility, security, and fleet management solutions targeting the small-to mid-sized business and enterprise customer segments.



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Succeeding when you're supposed to *fail* & *failing* when you're supposed to *succeed*

—Steve Blue

Percy Spencer was supposed to be a complete failure in life. His father worked in a sawmill, until he tragically died in a freak accident when Percy was a toddler. His mother soon left him an orphan.

But Percy's uncle took a liking to him and took him in, and he developed a special bond with him… until he died when Percy was only seven. Then Percy was forced to drop out of school in the fourth grade to support the family. His days were 14-hour work-a-thons at the spool mill. And yet, in spite of all that, Percy taught himself math and science. He co-founded a defense contractor company. And he went on to invent the microwave.

In the book *Succeeding When You're Supposed To Fail,* Rom Brafman examines the lives of people like Percy and others who had no reason to succeed but, in spite of all odds, did. It is a fascinating look into the socio-psychological factors that cause people to



Silent Business Killer #1: thinking life is great when it is not.

be successful when they are supposed to fail.

(This subject fascinates me. How is it that two people with the same socio-economic backgrounds can be so vastly different in the workplace? The airlines are a great example of this. I have been on many planes and seen two flight attendants on the same flight with vastly different attitudes. One has a terrific attitude while the other is a wombat in the air. And yet they work for the same company, for the same supervisor, under the same working conditions, and probably for the same compensation. Though my analysis of this phenomenon is much more fundamental: By the time you or I get them as an employee, they are what they are.)

But, as the title here indicates, I am more concerned about people and companies that are supposed to succeed, but fail instead. Are you one of those? Is everything just rosy with your company? Are you the darlings of the Inc. 500 set? Can you do no wrong? Well, you might be one of those companies that are about to fail, even though you are supposed to succeed and indeed have been wildly successful thus far. Beware the silent business killers.

Stone Equipment Company was just one of those companies. Starting from practically nothing, this privately held company bootstrapped its way to $55 million at its peak. And then it crashed and burned during the recession of 2009. Stone failed when it was supposed to succeed.

Stone made all the right moves: an enlightened management team, an engaged board, a thorough and comprehensive management succession plan, and a self-directed workforce; and it was 100 percent employee owned through an ESOP. How could this happen?

They succumbed to Silent Business Killer #1: thinking life is great when it is not. Are you guilty of this? Do you think life in your business is great when it really isn't? Many CEO's delude themselves by thinking the absence of symptoms means the absence of business illness. It does not. Just like many silent health killers, silent business killers remain hidden, under the surface, until they strike at the very heart of the business. And when they do, just like terminal cancer, it is too late to save your company.

So let's go back to Stone. How is it possible they didn't survive the recession? Could it be they didn't see the recession coming? That seems unlikely, unless they weren't watching for it. If they'd been planning for a recession, they would have battened down the hatches and prepared to take on water. That's what I did. I was watching for it, and at the first sign of the top line softening, I launched an aggressive cost cutting plan that was in the can and ready to go when I needed it.

Can this happen to your company? If it can happen to Stone, it can happen to any company. And it happened faster than anyone could have imagined, practically overnight. One minute Stone was a vibrant, growing $55 million company; the next minute, the banks were shutting them down. They didn't keep their eye on the ball of today.

I once had a boss who liked to live in the future—big picture guy, always looking to the long term. Just remember this: in the long term, we are all dead. If you take care of the business of today—and that means watch it like a hawk—you will have a long term.

With more than three decades of management, executive, consulting and speaking experience in markets all over the world, Miller Ingenuity CEO Steve Blue is a globally regarded business growth authority and turnaround specialist who has transformed companies into industry giants and enthralled audiences with his dynamic keynotes.

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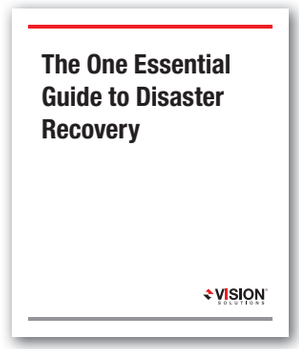
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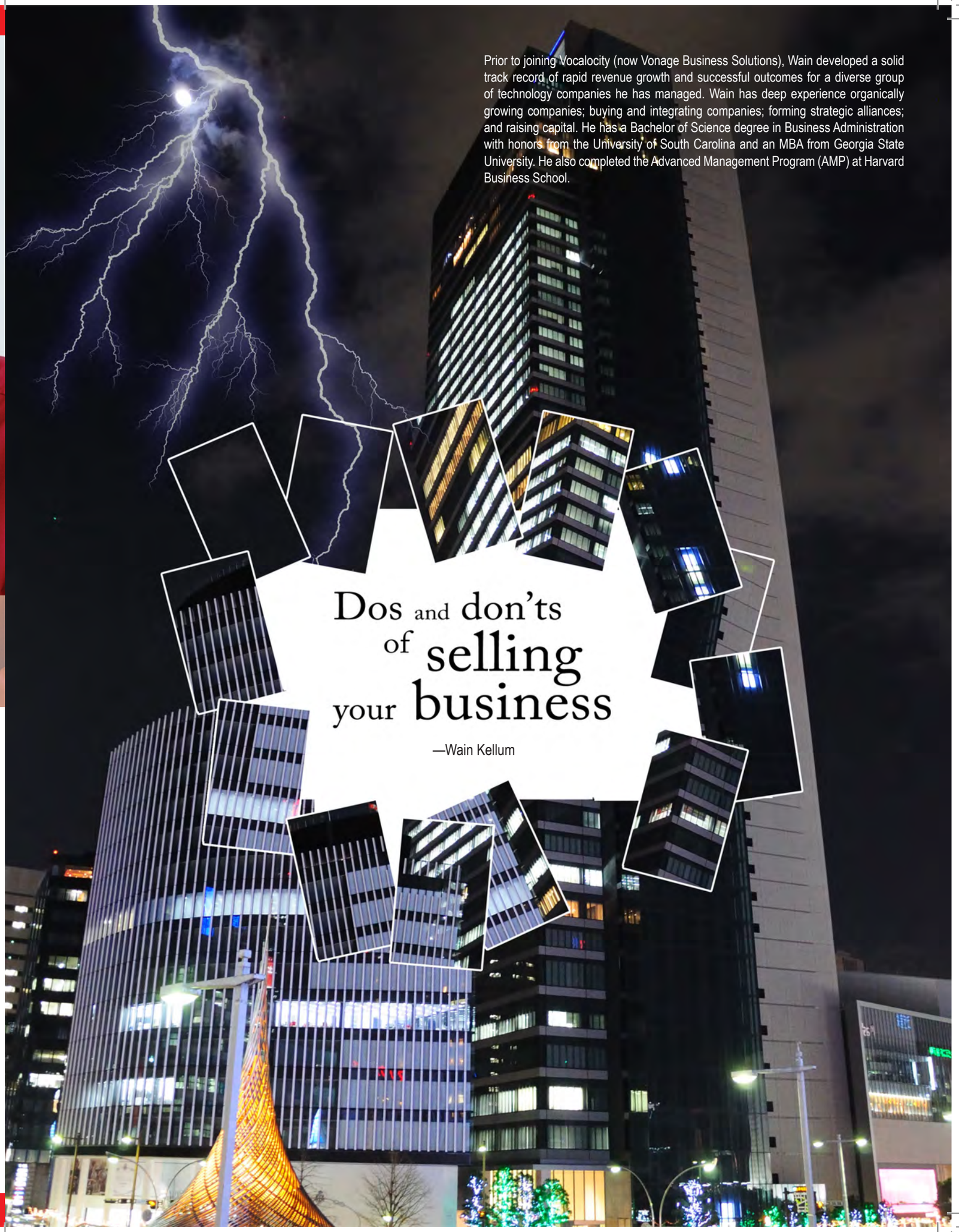


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Prior to joining Vocalocity (now Vonage Business Solutions), Wain developed a solid track record of rapid revenue growth and successful outcomes for a diverse group of technology companies he has managed. Wain has deep experience organically growing companies; buying and integrating companies; forming strategic alliances; and raising capital. He has a Bachelor of Science degree in Business Administration with honors from the University of South Carolina and an MBA from Georgia State University. He also completed the Advanced Management Program (AMP) at Harvard Business School.

Dos and don'ts of selling your business

—Wain Kellum

As a business owner, it is almost inevitable that you will face a time (or a few times) when you will consider or have the opportunity to sell your company. This can be a difficult choice to make, and it's important that this decision is not made in haste.

My current company, Vocalocity, is the sixth business that I have helped to start or grow, giving me decades of experience in buying, selling, and integrating companies. Throughout the years, I have had many successes as well as many situations that didn't go as I had hoped—the latter being more than I would like to think about. Based upon my experiences as both a buyer and a seller, I would like to share with you my dos and don'ts checklist for selling a company.

Don't let emotional attachment to your business drive your decision. For many of us, our business is like our baby. We birthed it. We nurtured it. We poured our souls into it to help it grow. Because of that, sometimes it's hard to imagine someone else taking over. Like all good business decisions, you must approach the sale of a business with objective reasoning, leaving all emotional ties behind.

Do let other, non-emotional drivers determine your decision. It's important to consider key questions before making the decision to sell your business. What's your competition landscape currently like? What's the state of your firm's financial outlook, as well as the state of the economy? Personally, consider where you are in your career. Are you ready for a change? Do you want to enter another venture? Do you want to retire? The answer to these questions will not only help you decide whether you should sell, but it will also help you decide what the terms of the sale should be.

Don't consider just one party. Looking at any major decision through a single lens can lead to a decision you regret later. Consider the many parties that will be affected by your decision.

Do consider all constituents. This means your employees, your shareholders, your customers… and you.

Don't sell during extreme turmoil. This is part of not letting emotions determine your factor. If you're selling just because times are hard, this could lead to you not getting an optimal outcome for your business. You may need to commit to one more heroic effort to position yourself for a lucrative outcome.



Do ensure your house is in order. Make sure your company's financials are in order. When I think about financial statements, I like to set the standard as "squeaky clean." It means that if a third party went deep into auditing your books, there would be no surprises. Your accountants and financial advisors should be able to give you honest and candid feedback on where you stand relating to this "squeaky clean" standard.

Don't do it alone. Every one of us is limited based upon our experiences and our inability to see beyond ourselves. A successful business leader often believes he or she is the ultimate and final say. However, it's important to understand that selling a company is new ground, and an advisor may have far more expertise and objectivity. Therefore…

Do hire an advisor. If you don't have legal and financial advice that far surpasses what you have, you have an advisor problem and are doing without expertise that can be very beneficial. I have had many successes because I was fortunate enough to receive sound counsel from people who had been through things that I was just starting to go through. If you don't feel like your advisors are offering sound counsel derived from expertise and experience, you should make a change.

Don't linger on the decision. Once you have made a decision, you have to move on. I have seen many a business get bogged down in the sale process, causing them to take their eye off of the ball and fail to execute. The sale ends up not closing; the business is in shambles; key employees have left, and there is a mess to clean up.

Do move on the sale once the decision is made. Pushing on timeframes to close becomes a key part of the seller's responsibility, once a sell decision is made. There are many things an owner can do to compress the timeline, and it needs to be a daily focus.

Don't just build your company to sell. Great companies are bought, never sold. If you work hard to build a good value proposition, always do what you say and really exceed customer expectations, good things will happen. Business owners who take shortcuts are always sorry.

Do sell…if it's right. Business ownership is awesome, but for many of us it can be all-consuming. Freeing up time to spend with family and pursue passions can be very liberating. And keeping these dos and don'ts in mind can help ensure your liberating decision doesn't turn into a decision you regret.

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—Dr. Tasha Eurich

Bankable Leadership:

Bankable Leadership: Delivering Happy People and Bottom-Line Results

A proud leadership geek, executive coach, *speaker, and author, Dr. Eurich is the author of Bankable Leadership: Happy People, Bottom-Line Results and the Power to Deliver Both.* With an M.S. and Ph.D. in Industrial-Organizational Psychology from Colorado State University and B.A.s in Theater and Psychology from Middlebury College, she serves on the faculty at the Center for Creative Leadership and has served as an adjunct faculty member in Colorado State University's Psychology and Business Schools.

Why won't my employees just do what I tell them? Why am I struggling to motivate my team? Why aren't they giving me the performance I need? If any of these questions sounds familiar to you, you're not alone.

You were probably promoted because you're a competent technical professional. You know how to build a bridge, negotiate a deal, or justify a capital expenditure. But whether you're a middle manager or a CEO, your technical skills usually won't help you be a better leader.

But effective leadership has an undeniable business value. In one study (How Extraordinary Leaders Double Profits), Jack Zenger and colleagues examined the best (top 10 percent) and worst (bottom 10 percent) leaders at a large commercial bank. On average, the worst leaders' departments experienced net losses of $1.2 million, while the best leaders boasted profits of $4.5 million.

Sink or Swim is Not a Plan.

As any disgruntled employee will attest, exceptional leadership isn't commonplace. One recent Center for Creative Leadership study reveals that up to 50 percent of managers are ineffective. And sadly, your company probably isn't doing much to help you. First, the company likely uses the wrong criteria to select leaders by focusing on technical, rather than leadership, skills. Second, most companies invest precious little to develop leaders, and training is often an isolated, one-size-fits-all event. Without follow-up, 90 percent of information from training programs disappears after three months.

Without organizational support, leaders wanting to improve are left to their own devices. But when they search on Amazon for leadership books, they're assaulted with more than 100,000 options. No wonder leadership feels so complex and impossible.

Luckily, there's good news. Though psychologists used to believe leaders were born, recent research tells a much different story—leadership is an acquirable skill. Recently, a study by Richard Arvey at Singapore's NUS Business School revealed that a whopping 70 percent of leadership is learned. That means anyone can learn to become an effective leader.

Two Behaviors All Leaders Must Master.

For decades, scientists have known everything we need to know about how successful leaders behave. It's like finding your TV remote tucked under a couch cushion after hours of searching elsewhere: The secrets to leadership really have been here all along.

In 1945, a group Ohio State University researchers set out to disprove the notion that leadership was an inborn personality trait. With 70 International Harvester Company foremen as their subjects, they discovered that leadership effectiveness was related to the presence of two independent behaviors.

First, effective leaders showed consideration, displaying support, compassion, and friendliness to their team. Second, they initiated structure. They clearly defined the role each employee played and drove their performance. Let's re-name these behaviors People and Results, respectively.

Indeed, you probably feel an inherent tension between People and Results. On one hand, you must build relationships by connecting with your team, earning trust and motivating them. On the other, you must drive top- and bottom-line results through their performance and productivity. I can drive them to perform, leaders think, OR I can be their friend:



Depending on your upbringing, culture, and role models, you'll find a comfort position between them. For a select few, that position is in the middle, leveraging each outcome to support the other. The rest fall somewhere to the left or the right, and some to the extremes:

- **The Cool Parent:** Left-side leaders act like the cool parent. Focusing on the happiness of their team at all costs, they don't set expectations, give honest feedback, or make tough decisions. Working for a left-side leader might feel pleasant… at first. But as soon as you need tough, but true, feedback, he or she freezes like a deer in headlights.
- **The Trail of Dead Bodies Creator:** Right-side leaders drive results so aggressively that they leave a trail of dead bodies. This leader requires grueling hours, is never satisfied, and withholds recognition lest employees become complacent. Though right-side leaders help you to up your game initially, in the long term, you suffer both physically (from over-work) and mentally (from lack of appreciation).

The best leaders are able to move to the middle, focusing on people and results. These bankable leaders create prosperity in the form of achievement, health, happiness and wealth for themselves, their team, and their organization. Think of the best manager you've ever had. He or she might have been a walking contradiction, achieving all of these things at once:

» Care for and understand team members AND set aggressive performance targets.
» Help team members succeed AND expect responsibility for successes and failures.
» Provide recognition AND push continuous improvement.
» Help you enjoy your job AND ensure everyone maximally contributes.

Three Actions to Become More Bankable.

Gather the Facts. Just like you can't start a weight-loss program without getting on a scale, you must begin your journey by learning the truth about yourself. We're often the worst evaluators of our behavior. You may have placed yourself in the middle of the continuum, believing you place an equal emphasis on People and Results. But your team might say, "Are you kidding? You're a total slave driver!" Use your resources and gather the facts, whether it's through an assessment or feedback in the form of conversations.

Be Laser-Focused. For executive teams, research by Paul Leinwand and Cesare Mainardi of Booz & Company shows that as their quantity of goals increases, revenue declines. Similarly, leaders often choose too many development goals. Give yourself the greatest chance for victory by developing one thing at a time. It is far better to make progress in one area than to make little or no progress in five.

Practice Daily. It's likely that you've had a development plan before… that gathered dust in a drawer. You were probably engaging in Delusional Development: the futile hope that just by wanting to get better at something and knowing enough to be dangerous, you'll show improvement. The amount of deliberate practice you choose will be proportionate to your improvement. The journey to Bankable Leadership is like learning a violin concerto: You have to learn the concepts (reading music) and behaviors (playing the violin). Then you practice every day to create beautiful music.

Bankable Leadership Happens Day By Day.

From music to science to athletics, people with average talent have achieved extraordinary things. Scientists used to think that superior athletes achieved greatness because of biological differences. But we now know that the best marathon runners, for example, simply train more in the weeks leading up to the marathon.

The same is true for exceptional leaders. That's why the "I just wasn't born to be a leader" excuse doesn't hold water. A person may not want to be a leader, which is entirely different. But with focus and commitment, anyone can become a more effective leader. The daily commitment it requires isn't always sexy, but it will make you a more bankable leader. Guaranteed.

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Telltale signs of adult ADHD

—Kevin Ross Emery

With high profile celebrities like NBC's 'The Voice' judge Adam Levine, TV news broadcasters like Phoenix-based Kaley O'Kelley, and others like "The ADHD CEO" Greg Selkoe now publicly owning their ADHD diagnosis, it begs many questions: How does one know if they have adult ADHD—what are the signs? Can problems with punctuality, organization, and focus be due to adult ADHD, or are these difficulties simply related to stress or other lifestyle issues? Is adult ADHD sabotaging your career, business or relationship? And, can ADHD actually manifest itself later in life after a diagnosis-free childhood? I applaud initiatives like 'The Own it Project' that are encouraging adults to recognize and even embrace their ADD/HD and get real answers to these and other important questions.

One does not truly outgrow ADD/HD. One hopefully just learns how to better understand, work with, and manage both the gifts and the drawbacks of ADD/HD. In some cases a person finds passions, talents, and gifts, and through hyper focusing into them, becomes enormously successful. Yet another person might struggle with addiction issues, low self-worth, self-esteem issues; end up in the penal system; or never get their act together and live far below their potential. Others simply find someone else who is perfectly happy to manage their life for them and find a career that is perfectly suited for them.

To outgrow ADD/HD is paramount to saying I am going to outgrow having blue eyes or brown hair. It is simply part of the package. And just like girls tend to mature faster than boys, ADD/HD individuals do tend to be late bloomers in certain areas, and that becomes more noticeable in boys than in girls because boys are late bloomers anyway.

Some of the most troublesome ADD/HD issues that show up in childhood are mediated through as people physiologically catch up to their peers. Nevertheless, the emotional and psychological damage of not fitting in, never living up to your potential, never understanding why you are different, or feeling like a failure are all other issues both the diagnosed and undiagnosed ADD/HD child often takes into adulthood.

The following things may have been present in your childhood, which allowed you as a child to slip through the ADD/HD loop:

- You were a visual learner.
- You went to a cutting edge, or smaller, higher quality school system.
- You were fed a better diet.
- You had parents who knew how to support you better and recognized all the gifts that came along with those things that would have gotten you labeled, and they thus refused to go for the label.
- You had at least one consistent loving adult who raised you through your first several years of life and who had the ability to recognize the things you needed to succeed and made sure you got them.

Whatever the reasons, as an adult, you are living with these telltale signs of adult ADHD, which can include the following negative and positive traits:

- Organizationally challenged
- Trouble starting and finishing projects
- Miss social cues
- Difficulty being subtle
- Hyper-focused to the point of losing track of time



ADD/HD authority Dr. Kevin Ross Emery is an international speaker and the author of *Managing the Gift of your ADD/HD Child and Managing the Gift: Alternative Approaches to Attention Deficit Disorder*, which are built upon more than 14 years of experience working with individuals of all ages living with Attention Deficit Disorder – and a lifetime of personal experience with the condition.

- Multitasks to the point of distraction
- Does not work well in a traditional workplace setting
- Marital troubles
- Poor listening skills
- Chronic lateness
- Angry outbursts
- Trouble prioritizing
- Gets bored easily
- Naturally rebellious
- Addictive personality
- Tendency towards self medicating
- High energy
- Highly creative
- Good problem solver, innovator, inventor
- When interested, love to learn, share and teach new things

There are untold millions of adults who were never diagnosed in childhood and are dealing with ADD/HD symptoms in an unproductive manner. The result is unhappy, underutilized lives that are not harnessing the incredible potential that comes with the "gift" of ADD/HD. Recognizing that, with proper self-awareness and management, there are many ways adult ADD/HD can prove beneficial is key for those with the condition to be genuinely happy and succeed at home and at work. And quick fix medication need not apply, with so many other methods now available to help ADD/HD adults realize whole life success.

Whether ADD/HD was identified in childhood or later as an adult, knowledge is power. And a proper adult ADD/HD diagnosis is paramount to managing the condition and actually realizing the many gifts ADD/HD has to offer the individual—and society at large.

I view ADD/HD as an evolutionary process that broadens the bandwidth of humanity, which we should celebrate rather than stifle. However well intended, society's collective attempts to medically treat and otherwise manage ADD/HD individuals often negatively impact their self-worth and significantly hinder their ability to reach their full potential. Indeed, the stakes are high when it comes to finding a successful treatment plan.

Those who have difficulties managing the condition or who face criticism from parents, teachers, and, in adulthood, from friends and business associates for perceived laziness and bad behavior can face a lifetime of emotional problems that can manifest in problematic personal relationships and career misfortunes. Plus, the loss of this population's insights, brilliance and creativity—their unique gifts—are typically sacrificed in order to help them fit in to society. Instead, we should celebrate and nurture those children and adults living with ADD/HD as they are so that they can, in turn, love and respect themselves and realize their full capabilities…to the benefit of us all.



"I view ADD/HD as an evolutionary process that broadens the bandwidth of humanity, which we should celebrate rather than stifle.





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Adopting social good as a core business practice

- Dane Atkinson

Contributing to the social good is increasingly important for many corporations as management and staff express desires to be good community citizens. Some of these companies are setting up giving that is based on their total profit, such as Ben & Jerry's long-term giving of 7.5 percent of pretax profit to its foundation. Other firms are incorporating giving directly into the design elements of their product.

What's the driving force behind this shift to social responsibility? The younger generation that buys products and services is moving towards companies that contribute to the community at large, and brands have taken notice. Diverting profits to good causes is no longer something to be avoided at all costs or performed sporadically, but is now an attractive brand attribute. Companies that fully embrace social giving within the product purchase experience often find they can demand a premium price due to their improved perceived stature.

The trick for companies that want to introduce social good into their practices is how to attract influential younger consumers while designing a workable plan for helping others. The companies that do it best have a focus on social good that is ingrained in the company culture. These are typically firms founded by people who want to earn money but also want to enact real change.

Social giving can be accomplished through many means: giving money, lending expertise, or simply donating the time of company personnel to a worthy cause. Entrepreneurs in the early stages of business planning should understand (a) that social giving can be worked into their overall planning and (b) that giving and volunteering can become a defining value of the business.

What about companies that are already on their way to donating money, time, or expertise? It might be a tougher sell to put in place a program where 10 percent of profits go to a clean water initiative when that represents a new strategy to investors. However, management can present a good case for the long-term ROI of a social good focus that builds customer appreciation and longer term loyalty.

Some firms are adopting a "one for one" style model of social good through which they send out a free product to a needy population for every one of their products purchased by consumers. Tom's shoes was obviously a leader here, and to date Tom's has distributed more than 10 million pairs of shoes. Warby Parker is another well-known firm that provides eyewear to people in need and also encourages local business and job growth. SumAll sets aside 10 percent of the company's equity to fund SumAll.org, a nonprofit entity that is driving social good through data.

Finding the right type of social endeavor to support is an important step for companies. There are a lot of possible avenues, such as promoting fair trade practices, driving green energy initiatives, reducing poverty, or providing tools to grow local economic activity. Social giving can be direct in terms of diverting profit or sending products directly to an organization; or it can be more indirect giving such as community service volunteering.

Many firms that offer a service can creatively find a way to lend some of their time and expertise to help either a community as a whole or a charitable organization that needs to run more effectively. Whatever the specifics, it is important for companies to identify their competencies that best match key social causes.

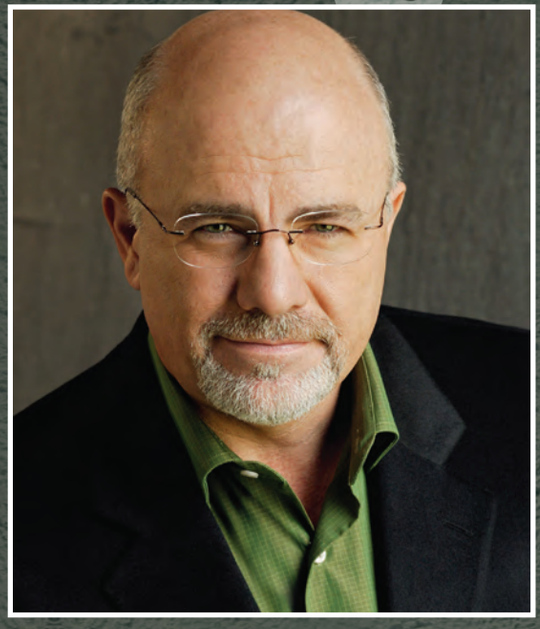
Pursuing social good initiatives requires some investment from the company and needs to be well managed and structured. It's imperative for businesses to neither just pay lip service to its social good endeavors nor to implement a program that is mainly hype and does not compare to other firms. Consumers are very savvy, especially those that focus their spending on social good campaigns, and they can easily spot a firm that isn't 100 percent invested in its stated mission. At SumAll.org we have in place an executive team that is now working with some of the biggest nonprofits in the world, helping them see new insights from all of their data.

Businesses have a duty to their shareholders. However, there are still many things a company can do to contribute to social good. A social good focus is not just about being a good corporate citizen; it also can be a shining brand attribute that drives consumer loyalty and instills a sense of pride and accomplishment for management and staff.

Dane Atkinson is CEO of SumAll.com.



Dave says.... on business Q&A



Dave Ramsey is America's trusted voice on money and business. He's authored three New York Times best-selling books: *Financial Peace, More Than Enough* and *The Total Money Makeover*. His latest book, *EntreLeadership*, was released in September 2011. The ***Dave Ramsey Show*** is heard by more than 5 million listeners each week on more than 500 radio stations. Follow Dave on Twitter at @DaveRamsey and on the Web at daveramsey.com.

Dear Dave,
I have an opportunity to buy a small business. What should I look for and what things should I check on before I make my decision?
Al

Dear Al,
The first thing you have to be absolutely certain of is that you're going to wake up every morning and be excited you get to go to work again. Business owners must be passionate about their line of work because they're going to be involved in each aspect of it every single day. Your vocation needs to be a vacation. Otherwise, it becomes a constant grind, and when that happens you're in trouble.

As far as buying a business is concerned, you'll want to take your time and really dig into things. In many ways, a business is only worth the income it creates, and just because it has a great location doesn't mean you'll make money. Who cares if they have a great name in the community if the business doesn't generate an income? The same thing goes for having a brand everyone knows. If they're not monetizing it, who cares? It all comes down to the net profit of the business.

Sometimes people buy businesses on multiples of gross sales before expenses. You may know enough about that particular business to understand that you run it for a certain number of percentage points of the gross. In that case, you'll know what your profit will be. But most of the time when buying a small business, especially if you're a rookie, you need to concentrate on gross revenue, expense details and the profit generated as a result.

Once you've done that, you'll want to ask what you will make on your money. If you're going to take on the risk of a small business, you want to be able to make at least 20 percent on it. In other words, if you buy a business for $100,000, it needs to make at least $20,000 a year.

The least it's worth is called book value. Once you own the business, if you collected all the receivables, sold off all the equipment and inventory then closed the business, what would you have in your pocket? That's the

Dave says...

book value. If the current owner has $40,000 in inventory, $30,000 worth of equipment and $30,000 in receivables, the book value would be $100,000 just if you close it. Those are your floor and ceiling values. Somewhere in between you'll find a fair price.

And remember this: If someone says a business does $65,000 a year, but they only pay taxes on $40,000, that means all they made was $40,000. If they don't report it to the government, it doesn't count. Don't pull that under-the-table kind of stuff. A business is worth what is reported to the government, so take a good, hard look at the tax returns.

Lastly, do some research and find out if there's someone in the same business, in another city, who would mentor you for a while. It just might be worth the price of a plane ticket to pick their brain and just listen to what they have to say. Chances are if they've been in business for a while, they know the ins and outs of the industry.

Good luck, Al!
—Dave

Dear Dave,
I have a small business doing work on houses. We have lots of repeat business, but sometimes people don't pay and we have to drop them as customers. Do you have any advice for avoiding these situations?
Steve

Dear Steve,
Virtually every small-business owner runs into this problem. The truth is collecting isn't a customer problem; it's a sales problem on the part of the business.

When we sell advertising for my radio show then have trouble collecting, it means we sold the account improperly. Now, what is a properly sold account? A properly sold account is one in which we approached a qualified customer who had money, and the relationship was constructed in such a way that they realized from the beginning paying us on time was an – important—even vital—part of the relationship. When we sit down with potential advertisers, we make it clear that we will bill them exactly on the 25th of the month. We also stress that we expect to be paid within five days. If we don't have payment by the first of the next month, they'll be getting a phone call. Then, if they don't respond to the call by the 15th, they won't advertise with us ever again.

That may sound harsh, but I believe a thorough understanding is essential in all business transactions. It keeps things professional and eliminates a lot of unnecessary stress for you, your team and your bottom line!
—Dave

Dear Dave,
I have a 140-acre farm, and I recently began running my operation debt free. The problem is that I have $250,000 in debt hanging on from bad decisions in the past, and the varying expenses in my business make it difficult to budget. Do you have any suggestions for budgeting in a volatile industry like mine?
Tyler

Dear Tyler,
Obviously, you want to set up a separate budget and run a profit and loss statement. You'll want to estimate the income, as best you can, for the year, and you'd need to estimate your expenses item by item and category by category for the year. Then, you'll want to break that down by month. This is called laying out a business pro forma. In other words, a business budget.

Next, you've got two goals to work toward with your profits. By profits, I mean after you've paid household expenses. That includes a living wage, enough to operate, keeping food on the table, the lights on and that sort of thing. After basic living expenses are out of the way, your net profit in the business should be divided between retained earnings—which is savings—and debt reduction. The idea here is that you're going to put the lion's share toward paying off debt. Still, you need to have something set aside for a rainy day. In your case, that could be taken literally.

Keep in mind that in business, retained earnings are used for more than just emergencies. They're also for buying equipment, more land and anything else that will grow your operation. But you always want a pad in there for that and other reasons. What if you have a strange year, and your budget estimates were way off? It could be unexpected expenditures or the fact that you simply had a bad year. In business, that's called an emergency, and you'd take that out of retained earnings.

Doing a budget, whether it's in personal finance or a business, is something that gets easier and more accurate with time. You won't get everything right the first couple of tries, but over time your estimates and budgeting skills will become more accurate because they'll be based on experience.

Good luck, Tyler!
—Dave

Dear Dave,
I own a small business, and I'm having trouble scaling up while keeping expenses down. Do you have any advice for me?
Josh

Dear Josh,
There are two types of expenses: fixed and variable. Variable expenses rise as the volume and size of your business grows. A good example of this would be shipping. The more stuff you move, the higher your shipping bill. Fixed expenses are there regardless of your income. Rent is a fixed expense. The amount doesn't change, and you have to pay it whether you're making money or not.

The best advice I can give you in a scenario like this is to take a deep breath, and accept the fact that you need to slow down and grow slowly and steadily. If you let expenses get out of hand, you'll be chasing them and playing catch up for the life of your business. Overhead kills businesses, Josh. It's the death knell.
—Dave



Tips on

—Stacia Pierce

Burnout is all too common for entrepreneurs. As a business coach, I see it happen most often with new entrepreneurs. They are trying to put it all together and make it all fit. Sometimes they are still juggling full- or part-time work with a new business. Entrepreneurs have a big vision and are excited to see it come to fruition. But although they know ***what*** they want to do, they often are lacking the ***how***. Not knowing the latter will put you on the fast track to getting burned out.

Stacia Pierce is life coach, career expert and the CEO of Ultimate Lifestyle Enterprises based in Orlando, FL. Stacia is committed to empowering women around the world to live their dream life and excel in their dream career.

Stacia has contributed to various national media outlets such as Redbook, Forbes, Fox Small Business Center, Metro, Entrepreneur and Steve Harvey. She also hosts an annual conference, The Women's Success Conference, which attracts over 5,000 women annually. and was a top winner on Oprah's OWN Network contest with 7.6 million votes.

preventing BURNOUT for **new entrepreneurs**

The first key that I often share with coaching clients starting new businesses—and this is so important—is to let go of trying to achieve balance. As a business owner, your work life is going to flow into your personal life and vice-versa. There is no getting around this. Stop trying to keep business and your personal or family life separate from each other. It's okay if they mix together. For example, I travel regularly on business. However, many trips include my family because in between business meetings, I make time to spend with them, dining, shopping and enjoying each other. If I insisted on keeping business trips and family vacations separate, it would be difficult for either to happen.

As an entrepreneur, your schedule will be hectic at times. There will be times when your focus has to be all business. However, the beauty of entrepreneurship is that you can make your own hours because you call the shots. You can't find the ever elusive balance if you still have a 9–5 employee mentality. If you want or need to take time out for a personal pursuit or family activity, you can. It could be as simple as getting up earlier to work a few hours before heading out with your family.

To me, true balance is goal achievement—however, you have to direct your time and attention to make it happen. Remove the picture you have in your mind of what having balance is supposed to look like. Instead, focus on productivity, and the rest will fall into place.

Use goal cards to stay focused and be reminded of what you are doing and why. Frequently writing and reviewing your goals, meditating daily and speaking positive affirmations will keep you motivated. The only reason you don't have everything you want is because you haven't set a goal for it. When you start setting goals, you will get faster results in your business.

Another key element to prevent burnout is organization. It is the key to maximum productivity and the biggest secret to reducing work-related stress. Lack of organization will lead to frustration quickly. On the other hand, when you have order, you'll feel more in control and confident throughout your day. Use lists to keep everything on track. Living by a list will help you get more done.

> "As a business owner, your work life is going to flow into your personal life and vice-versa.

It will help you to prioritize your tasks and your time, so you can ensure you are focusing on the most important tasks first.

Journaling is a creative release that can prevent burnout. Keep different journals: for ideas, for general notes, for your lists, for reflection, and to track your progress. It is good to spend just a few minutes in the morning or at night writing down your thoughts to clear your head and to plan for the next day. Journaling at night may help you sleep better. You can rest well without nagging feelings of unfinished business or looming projects swirling around in your head. Simply drain your brain on paper, sort through your ideas, create plans, and when you're done, close the book.

Stay on the hunt for new information to refresh your mind and inspire new ideas. Look for books on topics that pertain to your business or areas that can help improve your skills. Seek out journals, magazines, and blogs for current information that interests you.

To prevent burnout, you have to guard your thinking. It's important to maintain a positive attitude and outlook. Sometimes when you're working hard, you can lose sight of the big picture. Don't sweat the small stuff—instead, stay focused on your company's overall mission and vision. Don't micromanage, over-think, or over-analyze. Make decisive decisions that will propel you forward. Don't dwell; just keep it moving!

Once you have these internal things in check, you can focus on the external and preventing burnout in other ways. Allow yourself time to play by taking time out to do what you enjoy. This type of release will refuel your energy, give you new ideas, and keep you refreshed when returning to work.

Your health is important. Eating well and exercising should be a part of your lifestyle as an entrepreneur. The better you feel, the better you can run your business.

Avoid getting stuck in a rut. Change up your daily routine and environment. Get out of the office for something new. Take your laptop to the bookstore or café and work. The change of scenery will likely spark creativity and give you a boost of energy. You'll also open up opportunities to meet new and exciting people.

My last tip for preventing burnout is to get a coach. A coach can create shortcuts to success by guiding you and helping you avoid pitfalls. A good coach also challenges you to succeed on another level and challenges you to upgrade your thinking. This kind of accountability can help you progress with energy and excitement.

When you're feeling overstretched or overwhelmed, take a moment to breathe and think. Implementing these principles little by little into your daily routine can keep you going strong, excited about achieving your goals, and growing your business.

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5 Critical Issues to Address in Your Company's BYOD Policy

—Ashley Shaw

BYOD – "Bring Your Own Device" technically. "Bring Your Own Disaster" less lovingly. Whatever you call it, it is something that should be on your mind.



Ashley Shaw is a Legal Editor at XpertHR US, a comprehensive HR compliance website covering federal, state and local laws, where she writes on employment law and HR issues, specifically those dealing with risk management regarding workplace health, safety, and security. She also writes for XpertHR's Employment Intelligence blog. She received her Juris Doctorate (JD) from Jones School of Law in Montgomery, Alabama and a Bachelor of Art (BA) in English from Kennesaw State University in Kennesaw, Georgia.

The trend of BYOD, allowing workers to bring in their own devices such as phones and tablets to perform work functions and access work information, has been consistently growing over the last several years. A quick search of BYOD statistics shows that a good portion of businesses already allow BYOD, and many more plan to allow it within the coming years.

Allowing BYOD in the workplace offers many benefits to employers. For example, it can save on the cost of technology as employees are buying their own devices. In addition, employees tend to be happier with their own technology because they get to pick it themselves.

BYOD is not without pitfalls, however. There are security concerns, productivity concerns, privacy concerns. Basically, there are a lot of concerns.

While it may not be feasible or advisable to ban the BYOD practice, before allowing it, business owners should create a BYOD policy that addresses potential sources of liability to better protect themselves from potential BYO disasters. And to be effective, when a BYOD policy is in place, it should be enforced, enforced, enforced!

Here are 5 issues that all BYOD policies should address:

1 Securing Confidential Information

When employees access work-related networks from their personal devices, it can open up a slew of problems. What safeguards—such as firewalls or virus protections—do they have on the device? What happens if they lose the device? What happens if they quit, but their device still has confidential information?

A good BYOD policy will address these issues. Here are some ways to do so:

- Require certain levels of protection to be installed on the device before allowing access to protected information.
- Require passcodes that meet specific functions, such as a minimum amount of characters. Then, require frequent changes to the passcode. Finally, have a system in place to lock the phone if a certain number of unsuccessful attempts occur.
- Be able to remotely swipe the device. This is especially helpful if the device is lost or stolen.

> *"When a BYOD policy is in place, it should be enforced, enforced, enforced!*

- Make sure that employees only access secured Wi-Fi networks. Unsecured networks greatly increase the chance of a security breach.
- Make sure that employees turn off their Bluetooth settings when not in use, which prevents hackers from using Bluetooth to remotely access the device.

It is important to clearly and noticeably state these practices in the policy and have employees sign a form acknowledging that they have read and understood (a) what is expected of them when using their own devices and (b) what the employer can do to ensure business security even on a personal device.

It is a good idea to make it clear that these rules relate to accessing the business tools. Because it involves personal devices, employees could see these restrictions as personal invasions. However, if it is clear that this is not a limitation to a personal device but an invitation to join business networks, it might seem more palatable.

2 Productivity

When working on a personal device, it can be tempting to work on personal tasks. Social networking, games, online shopping—with the plethora of options out there (and knowing the employer is not tracking browsing history on a personal device), employees might be tempted to become less productive.

A good policy should address employer expectations when it comes to technology usage. To prevent the policy from becoming something that employers only hope employees follow, employers might keep productivity moving by (a) letting employees know that it is not okay to play during working hours and then (b) doing something about it when an employee is caught spending work time on personal tasks.

3 Protecting Employee Privacy

A BYOD policy should list what can and will be monitored. It is important that work-related sites, email accounts, apps, etc., be monitored for correct usage, but not all usage of a privately owned device should be monitored. Unless it is done for a legitimate business purpose, an employee's device should not be supervised.

4 Segregation and Ownership

One way to determine who owns information, social network accounts, documents, inventions, or anything else might be to look at where it was created. Was that social network account created on a work computer and consistently accessed on the work computer? Then it was likely a work account that belongs to the employer. While this is only one of the considerations, it is among many issues that become blurred when using BYOD. In this environment, it is much harder to segregate personal from business information.

Employers should carefully address these issues in the policy. Intellectual property ownership, as well as ownership of social network accounts, should be stated in writing before a problem even occurs.

5 Environments

Some working environments are just not safe for delicate technological devices. (Think of a concrete factory floor where the device could break on the concrete or on a production line.) Before personal devices are brought into these areas—subsequently breaking—the policy should state what, if any, devices can be brought there.

The same can be said of environments with lots of sensitive information. With most devices having built-in cameras, it can be easy to snap a picture of confidential materials. A business with highly sensitive data might wish to place bans on having personal devices in these sensitive areas.

There are many more concerns that result from allowing BYOD, and it is advisable to work with a legal department or law firm to create a BYOD policy, but addressing these five issues is a great way to start. Keep in mind, however, that no matter how good the policy, it does nothing if it is not strictly enforced.



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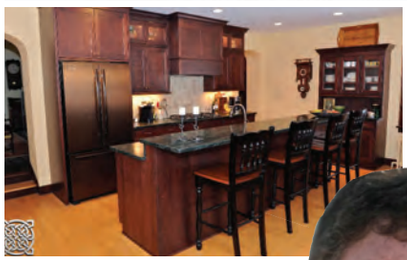
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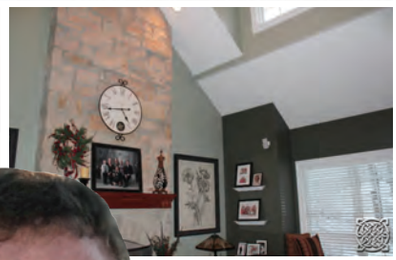
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PATRICK FINN

—Tom Ryan

Patrick Finn is an entrepreneur who came to the United States as an Irish immigrant with skills in the construction trades. Like so many other immigrants before him, Patrick decided that the path to a better life for himself and his family was to create his own business from the skills which he possessed. Patrick A. Finn, Ltd., which specializes in home remodeling and custom home building, was born out of a dream but built from the master craftsman skills of Patrick Finn in 1991.

Today Patrick A. Finn, Ltd., has earned a reputation as a top remodeling company in the Chicago area and was selected by Professional Remodeler magazine as one of America's Top Remodelers of 2013. The magazine chooses the top remodeling companies in the top 20 remodeling markets in the United States.

Under Patrick's leadership, Patrick A. Finn, Ltd., recently won 12 awards for "Excellence in Design and Construction" presented by the Home Builders Association of Greater Chicago.

Patrick's success did not come without major challenges. Like so many other home remodeling companies, Patrick A. Finn, Ltd. was hit hard by the Great Recession. Patrick credits the methods, systems, controls and incentives installed in his business by the consulting company GPS as one of the major reasons he succeeded in weathering the economic downturn.

What follows is an interview with Patrick Finn about his journey from craftsman to entrepreneur and what it took for him to succeed over the long run when so many other home remodeling companies failed after the economy went into a tailspin.

Before you started Patrick A. Finn Ltd., how did you get started in the construction trade?

I got started in London, England at the age of 18. I emigrated from Ireland to England because there were no jobs in Ireland at the time I graduated from high school. My goal had always been to come to America. When I was eight years old, I decided I was going to emigrate to America. My grandfather, who had worked on the docks in New York in the 1920s before returning to Ireland, used to take me down to the shores of the Atlantic on the Irish coast and have me put hands in the water and run my fingers back and forth in the ocean. He'd say, "Patrick, on the other side of the Atlantic is America." So at the age of 20, I realized my long-term dream of emigrating to the U.S.

What motivated you to start your own business and become an entrepreneur?

I always wanted to work for myself. My father had a small excavating business back in Ireland. When I was in high school during the summer holidays, I would work about 55 to 58 hours a week with him. He agreed to pay me on a pay-performance basis. I made a lot of money working this way—enough to put

myself through boarding school the last two years of high school. I also did his books at night and on the weekends. I always wanted to work for myself. I thought that was the only way to go.

When you first came to the United States, did you get involved in the construction business then, as an employee? Did you work for somebody? What was the initial experience you had in the construction business in the U.S.?

When I came to the United States, I made a conscious decision that I was going to work for myself. With that in mind, I wanted to learn every aspect of every trade as much as I possibly could. So I set about doing that. I was a carpenter in England, so I started out in carpentry here, in residential. After a while, I started doing some commercial, and mixed them back and forth. While I was doing that, I was learning about other trades, as well. I didn't practice the other trades, but I learned how things were done correctly. I became a superintendent for the residential contractor I was working for, so I met with inspectors and managed the trades to make sure they were doing their jobs correctly. That was a great proving ground, or practice, for me before I went into business for myself.

When did you begin your own business, Patrick A. Finn Ltd.?

I started when I was 25 years old. It was October 1991.

Did you have any background running a business before you started Patrick A. Finn Ltd.?

Only the little bit I had with my father's business and what I picked up from reading books on business management, leadership and things like that. When I was working with my father, he would take me on sales appointments, and I would help him with basic accounting and estimating. Because I would go on sales appointments with him, I became pretty good at reading people, as I would accompany him on a lot of his sales calls. That is a skill that has served me well over the years, especially since I've been in business for myself.

Did you put in place any management systems when you first started your business, or did you try to run the business just on the knowledge you had at the time?

I had no management experience, so I didn't know about systems and processes. I ran the business out of my checkbook and on a cash in and then a cash out basis—basically, flying by the seat of my pants.

That's so common with entrepreneurs. Your experience is very similar to what we find with our clients.

My father used to say (and this is what motivated me to start my own business and become an entrepreneur), "When you're working for somebody, do it as if you're working for yourself." My father added, "Work as if you were doing it for yourself, and one day you will be working for yourself."

So establishing my own company was a realization of a lifelong dream. I just made it a reality. That's how I got started in business for myself. My father used to drill into me—no matter who we work for, no matter what kind of work we were doing, no matter how much we were getting paid—always do it as if I was doing it for myself. When I started doing it for myself, it was a realization of those dreams and aspirations.

What were the challenges you faced when you first started out, and what problems confronted you?

I didn't know that business thing that was called overhead. It never crossed my mind to charge for overhead; and even if I did, I didn't know how to figure it out correctly. I lost a lot of money the first three years in business. Finally my accountant said to me at the end of the third year that I needed to make a decision. That was to a) work for myself and learn how to make a profit, or b) go work for somebody else because what I had been doing for the first three years wasn't going to work. I was losing money every year. From that moment on, I made a conscious decision that I would work to make a profit. For the next couple of years, I broke even paying myself a salary and what not. But eventually it got to a point where I was able to figure out my overhead and included that in my estimates and started to make a profit. So I was lucky I made it through the first five years. As you know, many businesses go out of business in the first five years, but I managed to make it work in year four and five.

In terms of the evolution of your business and the evolution of your understanding of what you needed to do as the owner, managing the business, why did you decide to bring in a management consulting company to help you with your business?

When the sales person came in from your company, he had a questionnaire about a lot of things… such as project management, how to figure out how to break even, and how to put in place the proper systems and processes. I realized then that I had very few of these in place. I was doing about $3 million a year, at the time. This was from 2000–2007. I wanted to double my company up to $6 million. I knew that the knowledge I had that got me up to $3 million was not going to work to double the size of my company. I had reached the absolute limit of my capacity and my knowledge base. I wasn't able to go any further, no matter how hard I tried. I could get a bit higher than $3 million, but I couldn't do it consistently.

That's an important self-assessment that you made that a lot of business owners fail to see about themselves, that they've reached their own capacity and need some help. That was a great decision that you made. What gave you the confidence to bring in the consulting company for a business analysis?

I knew that I needed to develop systems and processes. What scared me about how I'd been operating up until the time I brought in a management consultant company is that I knew I had a blind spot. I just didn't know how big it was, and I didn't know what I didn't know. That concerned me. When I hired your firm to help me, my number one thing was to reduce my blind spot. The things that I didn't know, I started to learn so I could reduce that blind spot.

What did you learn from the initial business analysis about yourself and the way you were running the business?

The analyst quickly pointed out that I had revenues of about $12 million in the previous five years; and apart from a good salary, I had no retained earnings. And—because of inefficiencies and lack of processes and procedures, job descriptions, proper cash management—hundreds of thousands of dollars had slipped through my fingers. I couldn't account for it.

I literally had squandered hundreds of thousands of dollars in the previous five years.

What management systems did the consulting company put in place for you, and how have they helped you?

The management consultant came in for six weeks for the first engagement, and I've had multiple engagements with your firm since. On the first engagement, the first thing he had me do was list out all the things that I did personally. The second thing was he helped me create a job description for all six things. He said, "At the end of our six-week engagement, we will have you doing just two things. We'll have delegated four of the other things to other people, successfully, and they will be doing them. You won't have to worry about it. The two things you'll be left with are 1) to manage your money, and 2) to manage your managers." I didn't believe him. But week by week we created job descriptions, and we'd assign each job to somebody else. Sure enough, at the end of six weeks, I was there wondering what the heck I was going to do with all my free time. I now had a ton of it, and all I needed to do was manage my money and manage my key people. It was fantastic!

He also helped me put in a variable management report so that I could do a budget. He helped me create a budget, which I hadn't done in 15 years. He helped me struggle through and create my first budget. And then we created a monthly variance report that I could check to see where I was, versus my budget. He also helped me establish some benchmarks—weekly gauges like what cars have on the dashboard, so I could check them on a weekly basis to make sure my company was hitting all the metrics that we needed to hit on a weekly basis. I felt like a monthly basis was too far out. This let me course-correct a lot faster. The consultant helped me create a cash management system, helped me figure out my profit for each job, and explained the difference between margin and markup, making sure I was allocating enough money to overhead properly.

One of the most important concepts he gave me was "pre-planned profit" or "profit engineering," making sure that the number one thing I put in all of my estimates was that pre-planned profit, and how to figure it out, and how to make sure it was working correctly. That was huge. I learned a ton of stuff.



Now that you are managing your managers and managing your money, give me a summary of how you are managing your business differently today compared to the way you managed it before you brought in our consulting company.

Before, I used to do just about every single thing except for the bookkeeping. Today, thanks to the consulting, I have a project manager in place, an interior designer in place, and an office manager in place. They have job descriptions, they know what they're supposed to do, they come in and do their job. To manage my company, I check in with my project manager and interior designer on a daily basis. And then I leave them to do their jobs.

We have a weekly management meeting which gets me up-to-speed on what's happening on every job. In the past, I would go by every job, every single day. Now I go by the jobs maybe once every other week, and I know exactly what's happening all the time. If a client calls in, I know exactly what's going on; and if there's a problem, I can address it right there because I know exactly what's happening, without me having to set foot on the job. I have great confidence in my leadership team. I express that to my clients, and they know that one of our selling propositions is that they're not just getting me, they're getting a true company. They're getting a team of professionals and our years of experience and collective knowledge. While they may spend a bit more for that, they realize they are getting better value. Because, working as a team, there's a lot of advantages. Everybody brings a lot of strengths to the table, and it better serves our clients' needs.

Today, in managing your business, what are the reports you regularly look at, and how do they help you manage your business better?

Things I look at today: cash management. My office manager inputs all the data into that, and we look at that once a week to decide who's going to get paid what and how much. We can check receivables, we can check payables and the recurring bills. We always know what our cash position is. I have my office manager send me my bank balances every single day so I know what my cash situation is. That's a big concern of mine: making sure we have enough money in the pipeline to pay all the bills. I have nine metrics that I track on a weekly basis: leads, quotes, sales, sales dollars per hour (which is an efficiency metric on our employees' productivity), sales backlog, my throughput, my overhead, my net profits, my income. Also, from our yearly budget, we create a monthly budget with seasonality built in because now we have several years of tracking seasonality of our business. Our budget varies every month, due to the seasonality of our business. With our BBP report, our internal management report, we're able to track the variance from that with our actual numbers. That's very helpful in guiding me on which way to run the business.

Prior to that, I was using my accountant's quarterly accounting statements; and by the time I'd get those, it would be a month and a half after the quarter had ended. It was very hard to course-correct because it felt like I was looking out the rearview mirror. With the reports I have today, I'm looking out the front windshield in the car, and I'm driving a lot more effectively because I can course-correct to make changes as I need to on a far quicker basis. So there's more of an impact.

As you know, maintaining a positive cash flow is necessary for any business to be successful. How have the new reporting systems the consultants put in place helped you manage your cash flow better than when you were previously working out of your checkbook?

The cash flow system we have in place today allows me to see my receivables and payables on a six-week rotating basis. Using this tool, I'm able to forecast a lot better how to conserve or spend my money. It also allows me to let my vendors know exactly how they will be paid and how much. Because we always follow through on our word, they never have to worry about getting paid from us, as we have a proven track record with them.

Because of this, we're getting great service from our vendors and service providers. They know we're going to follow through. Even as things get busy, our subs and our vendors always make sure we get priority in their selection of who they're going to service and who they're going to work for.

Have the consultants helped you in other ways with your business?

Yes, indeed. I've had multiple consultants from your firm. The consultants have helped me with tax planning. They've done a business valuation with me, which I'm about to update—both the tax plan and business valuation because both of them are now six years old. They showed me how I can save a substantial amount of money by avoiding paying taxes legally. The tax plan alone saved over $200,000 in taxes over five years. I'd highly recommend the tax planning to anyone and everyone.

How did the consultants help you manage your crews better?

We're a system-dependent company now, and everyone knows the role that they have to play and they play it. We see ourselves as a team. And as a team, we all play to win always, and we do win often. My project manager holds my lead carpenters accountable, and my lead carpenters hold their direct reports accountable. We've been able to drill things down so far that now all of our staff hold themselves and each other accountable. We have a plan in place, and we work the plan. Everyone knows the role they're playing; and they take responsibility for themselves, and they play that role correctly every single day, always.

Did the consultants help you improve the productivity of your crews?

Yes. They helped me create an incentive plan. I just had a consultant in for the last couple of days helping me redo the incentive plan. She helped me create an incentive plan that allows us to split any excess profit we earn with our field employees. We have a set amount of time that we're trying to get the jobs done by. If we get it done quicker, we have excess profit. And we split that profit 50/50 with our crews.

What is the biggest benefit you've received from changing the way you manage your business?

I've managed to cut back the amount of hours I work to 50 hours a week. I know that I can trust my employees 100 percent when I'm not in the office or on vacation. I know that the needs of my clients are always being met 100 percent of the time without me having to get involved in every situation, every day. This one thing alone is huge for me. I can focus on the business of the business. And when I go home at night, I don't have to worry about it because I have all my metrics in place, and I know my numbers. I don't have to worry and think about it in the middle of the night, how things are going. I know everyday where things are at, which gives me great peace of mind.

How did the ups and downs of the economy affect your business, and how did you survive the Great Recession?

In 2008, my business took a hit of 68 percent from 2007. My attorney told me, at the time, to go bankrupt because my bank wanted to collect on all my loans. At the time, I was doing spec homebuilding and renovation. My bank called all my loans and, in 90 days, wanted me to repay $3.5 million dollars, which I didn't have. I contacted my consultants and John Burgess, and they told me not to go bankrupt. Instead, they came in and helped me work out a plan where every one of my vendors and subs got paid as promised. This was huge. I earned their respect and loyalty once again in what was a very challenging time. I survived because I believed in myself and had enough confidence in the systems and processes put in place by the consultants and in my people to make it through, though it wasn't easy.

What do you see going forward for your business and the home remodeling industry?

I'm an optimistic person. I think 2014 will be a better year than last year, and I think we'll continue seeing improvement in our industry. It's improving slower than I'd like, but it seems to be going in the right direction, which is great. My business is perfectly positioned to grow at an accelerated rate as the economy improves. We have created a company with scalability that can quickly turn on a dime as needed, to grow quickly or scale back as required to adjust to the current economic conditions. We have a plan for both scenarios, and all we have to do is work our plan.

What would you say to a business owner who's considering bringing in a management consulting company to help them with a business?

Have the courage and conviction to allow someone, a stranger, to come in and show you how you can do better in your business—with the same people in place, or hire some new ones, if needed, as it was the case for me. I would say the business owner must be open to change and must be willing to push outside his or her comfort zone to learn and to be able to grow and take the business to the next level.

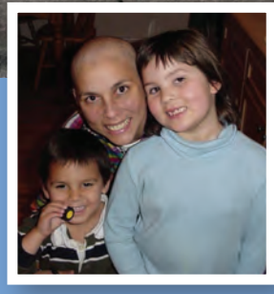
Any advice on choosing the right consulting company?

It's very important to choose a consulting firm that has a proven track record in being able to deliver on the results they promise. My consulting firm promised me a two-to-one return on my investment. I have been repaid for what services I undertook many, many times over. I would also want to know that they have helped business owners, just like me, to succeed and grow and to prosper… and, at the same time, have a better quality of life in the process. Now I get to spend quality time with my wife and family, and I've never missed any one of my children's sporting or school events because of my business. To me, that's priceless. I know so many people who don't have the opportunities that I have because they were an employee of some company or their time is not their own. I do what I do because I love it, and I am passionate about it. And I look forward to coming to work every day now because I am in control of my business, and it no longer controls me.

I live by the motto, "Do not follow where the path may lead, go instead where there is no path and leave a trail."



"The hardest part of having cancer was talking about it with my kids."



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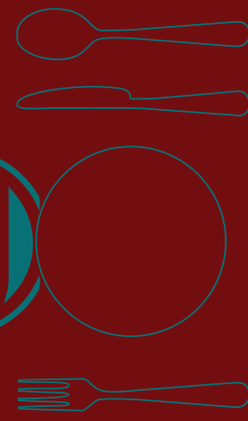




The most flavorful, healthful items are not even on the menu.

Dr. Jo® inspires busy people to stay healthy, sane and productive through her keynote presentations, books and media appearances. As a PhD nutritionist and registered dietitian, she's authored three books, including *Eat Out Healthy*. Her next book, *Reboot – power up your energy, focus, and productivity.*, is due out March 2014.

Eat Out Healthy



According to the NPD Group, more than half of all restaurant guests say they are healthy eaters at home. But, when it comes to dining out, it's a whole different matter—only half of those home healthy eaters eat healthy at restaurants.

Why? Some say they just want to indulge or they want to eat what they want. But others say there's nothing healthy on the menu or that the healthy items just don't look appetizing. And that's where diners go wrong. The most flavorful, healthful items are not even on the menu.

Here are some tips on how to eat out healthy at all your favorite restaurants—without feeling deprived:

1. Speak to the manager (not the server). Instead of ordering one of the "healthful" items on the menu (let's face it, they're often quite bland), consider ordering off the menu. For that you'll need to talk with someone who knows everything about the food: portion sizes, preparation methods, seasoning and the capabilities of the kitchen staff to make substitutions. So call the manager—best done ahead of time and between meals (such as 2–5pm) when they'll have time to talk. In most cases, managers are able to offer many more interesting (and flavorful) suggestions on what to order, as well as how to order it. Then, when you get to the restaurant, instead of holding up your party with lots of questions, you're ready to order. You can even assure the server that you've already run these special requests through the manager.

2. Ask for your steak, chicken, vegetables, pancakes, and more to be cooked as usual…but without the butter topping. Keep in mind that this is very different from asking them to prepare the food completely without fat. That's tasteless (double entendre optional). Most patrons are unaware that many restaurants dress up their food with a final brush or dollop of butter on top of nearly everything. At 120 calories per tablespoon those calories can really add up.

3. Skip the salad. If you're ordering the salad "because it's healthy" or to "get your veggies," forget it. Salads often consist of lettuce of low nutritional value (dark greens have more nutritional value than iceberg lettuce) along with high-fat/high-calorie ingredients such as croutons, cheese, bacon, and dressing—adding up to as much as 500 calories for a side salad.

4. Don't trust your instincts. Unless you can share a plate with a friend, it's best to avoid restaurants that use large plates, bowls and glasses. Dr. Brian Wansink, director of the Cornell Food and Brand Lab and author of *Mindless Eating*, has conducted dozens of research studies showing that people tend to eat 30–50 percent more when served large portions in restaurants. And, interestingly, this was true even when the food didn't taste good. Consider the study he did in a Chicago suburb where moviegoers who had just finished lunch were offered medium-size and large-size buckets of very stale popcorn. Those who were randomly given the large buckets ate 51% percent more than those who had the medium-size buckets.

5. Ask for the doggie bag with dinner. If you find yourself at one of those restaurants with very large portions, you might consider asking for the doggie bag right away—even if you're not planning to take it home. Out of sight, out of mind really does work. Chances are you won't even miss it.

6. Stand up and lose weight. Have you ever noticed that often it's not until you stand up at the end of meal that you notice how full you are? It takes about 15–20 minutes for your stomach to send the full message to your brain. Find an excuse to stand up halfway through the meal and ask yourself if you've had enough; often you'll realize that you're already full.

7. Eat very slowly. Actually, it's not just the stomach that sends the message to the brain that we're full: the sensation of fullness starts in our mouth. So take small bites, put your fork down between bites, and chew long enough to fully enjoy all those flavors in your mouth. Remember: people who eat slower tend to be leaner.

8. Look at the dessert menu first. If it's dessert that you came for, make your choice right away. Then, plan the rest of your meal around it. You might choose an appetizer instead of an entrée.

9. Remind yourself that it's waist or waste. Hate wasting food? Remember that when you finish everything on your plate, it adds to your waist. Doesn't waste seem more appealing?

10. Create closure. Most of us need a signal that the meal is over. For many of us, it's when the food is gone and the plate is empty. Given that dinner portions often contain more calories than you need in an entire day, that's a sure prescription for weight gain. Instead, use an alternative closure technique to reduce the temptation to keep nibbling. This includes moving your plate away (or covering it with hot sauce or your napkin), popping gum or a mint in your mouth, or sipping a cup of hot tea or coffee.

Eat right…and enjoy every bite!



Are small businesses getting personal enough online?

—David Brown



The way small businesses interact with consumers has remained relatively unchanged over time—customers for life are forged by connections built in brick and mortar stores and forged with strong personal, one-on-one relationships. However, consumers' spending habits have drastically changed as the Internet and social media have replaced yesterday's Main Street shopping experience. Today, consumers expect the same personal attention and engagement online that they receive from their in-person visits to local small businesses.

As consumers, we are looking for our online digital atmosphere to mimic that of a physical business. We want the in-store experience to translate online. The question quickly becomes: are small businesses keeping up with these changing consumer demands? According to a recent national survey by Web.com, more than 3,000 consumer and small business decision-maker respondents believe that the majority of small businesses are not delivering on these shifting consumer expectations as customers shop via the Internet and social media.

Consumers are inviting small businesses to build a relationship on the new "e-Main Street." This opens a tremendous opportunity for small businesses to reach and build loyalty by meeting consumer expectations through maintaining intimate and personal connections with their customers. The survey also revealed other key information about what consumers expect from small businesses online. Let's take a look.

Business really is personal. This is especially true when discussing the business relationship between consumers and small businesses (the overwhelming majority of consumers surveyed consider a small business to have fewer than 25 employees). Consumers prefer to work with small businesses instead of larger companies because of the strong personal relationships that often develop with the small business owner.

It's about the personal involvement. Consumers can work directly with the owner at a small business; at the big box stores, they'll never get that perk. Consumers also say that they enjoy small businesses because they are easy to do business with, reliable and very customer focused.

There is a significant disconnect between consumers and small business decision-makers. Both groups think differently about what is important in regards to web and digital capabilities. Consumers expect today's small businesses to build strong e-relationships with them online, whereas the small businesses are online to move the sales needle. Eighty-three percent of consumers surveyed said that whether or not a small business has a website and an active social media presence is important when they consider whom they will do business with.

Online opportunities abound for small businesses. Small businesses that meet consumer expectations for web, social media and digital business capabilities have a significant opportunity to improve their bottom line. Fifty-eight percent of consumers say they would be influenced to take positive actions (i.e., an online visit or purchase) if a small business delivers on their web and social media expectations. Positive actions include: recommending a business to family and friends, foot traffic to a small business's physical location, as well as consumers taking the time to check out what others are saying about a business.

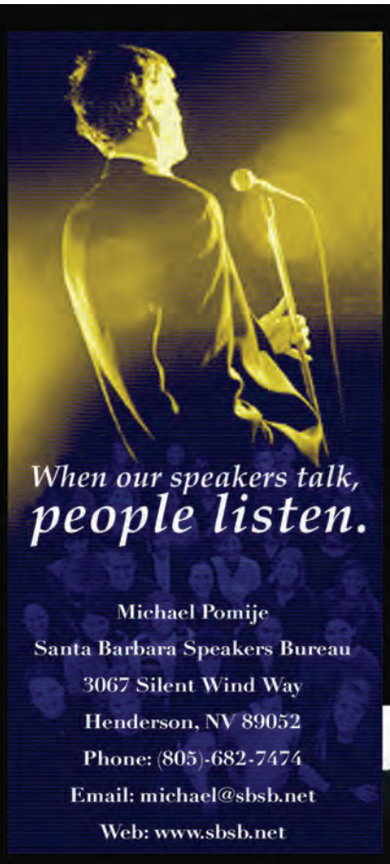
Additionally, approximately half of consumers would seriously consider a small business that meets their online expectations over larger companies and would include that small business on their short list of favorites, which in turn might lead to a sale or some other business transaction.

For small business owners, the online work has just begun. Discovering the untapped opportunity of creating or expanding a small business's web presence is just the starting point. There is more work to be done before small businesses can realize their full online potential. Less than half of the small businesses that were surveyed (41 percent) have a website today. Those who do not have a website do not see a need for one or think of it as a high-maintenance project to design and maintain. On the other hand, more than half of the small business decision-makers surveyed said that they understand (a) that online and digital capabilities are very important to their business overall and (b) that web, social media and wireless will be very important for their business within the next four years.

So, how does a small business decision-maker address the online disconnect with consumers? First, small businesses need to build a strong website and social media presence that includes basic information such as business hours and contact information—73 percent of consumers said that this is very important to them. Special offers, promotions and discounts are also important to consumers (63 percent to be exact), which can be promoted on a small business's website and social media channels. It's also best to integrate product comparisons, customer reviews and email based customer service into a business's online and digital presence because consumers also see those as important areas.

In the end, consumers are looking to create and sustain relationships not just offline, but online, too. Flourishing e-relationships could very well be the spark that your business needs to build an overwhelming customer base and move the bottom line.

David Brown serves as chairman, president and chief executive officer of Web.com, where he maintains heavy involvement in day-to-day operations. He was named president of Web.com in August 1999 and CEO in August 2000. David holds a BA in General Studies from Harvard.



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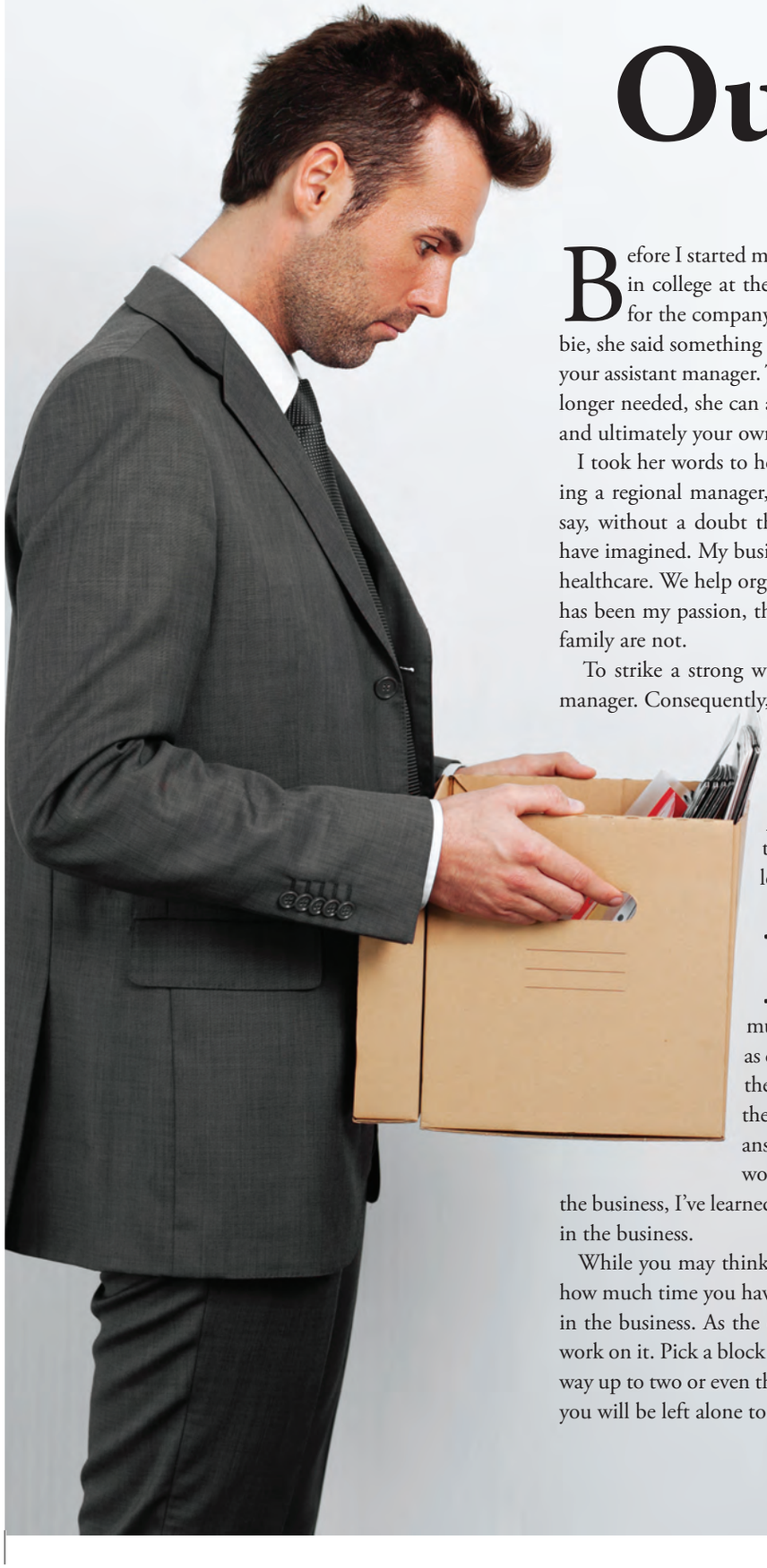
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A Leadership Reinvention: *Put Yourself* Out of a Job

—Traci Bild



Before I started my business, I was a store manager for a national retail chain. Still in college at the time, my big dream was to become a regional sales manager for the company. When sharing my goal with my own regional manager, Robbie, she said something I'll never forget: "The fastest way to get promoted is to develop your assistant manager. Teach her to do your job even better than you. Once you are no longer needed, she can assume your position while you get promoted to a bigger store and ultimately your own region." In short, put yourself out of a job.

I took her words to heart, and my dream took a different shape: rather than becoming a regional manager, I became an entrepreneur. Flash forward 20 years and I can say, without a doubt that this valuable lesson has provided me a life I could never have imagined. My business, Bild & Company, is a national consulting firm niched in healthcare. We help organizations close revenue gaps. While the business is and always has been my passion, the long hours, the stress, and the guilt of being away from my family are not.

To strike a strong work–life balance, I implemented the lesson learned as a store manager. Consequently, I built a company that has doubled in revenue each year since 2008 and landed on the 2013 Inc. 500/5000 list of the fastest growing private companies in America (#1,251), plus I wrote my third book, *Get Your Girl Back*—all while working just 24 hours a week. If you desire work–life balance yet want to continue to grow your company, consider reinventing your leadership style with the following four steps:

1 Take time to work on the business versus in it

First, you must make time to work on your business versus always working in it. To grow your company, you must lead; that means having time to cast a strong vision as well as develop the strategies and tactics to see your vision through. For the past decade, I have spent Friday mornings at Starbucks with the full intention of working on the business. I don't check email, answer calls or work on projects. I simply think, strategize and work through challenges to growth. The time spent working on the business, I've learned, is far more valuable than the time I could ever spend working in the business.

While you may think you don't have the time to do this, the fact is you do. It's not how much time you have, it's what you do with that time. You can hire people to work in the business. As the owner or leader of your organization, you must be the one to work on it. Pick a block of time each week, starting with just an hour and working your way up to two or even three. Make sure you get out of the office and to a location where you will be left alone to think, create, and strategize without interruption.

2 Let go of ego

To reinvent yourself as a leader, the single most difficult thing you must do is let go of ego. While difficult to admit, most entrepreneurs' egos keep them from growing. You cannot grow if you are doing all the work. You have a limited amount of time. Instead, you must set a goal to identify one or more leaders you can develop to assume your role. When doing this, think of your time pie: Where do you spend your time? Take a notepad, draw your pie and label each piece with your responsibilities.

When I brought on my first employee, my revenues were just $450K per year. I was a professional speaker and coach and could only take on as many clients as my schedule could handle. Upon having my first child, I realized that I had to cut back. I hired Julie, who is now my EVP, and started giving her my job, piece by piece. First, I trained her on my sales systems, took her to a seminar to see me speak, and then began the rigorous process of teaching her to coach and speak professionally. She shadowed me on coaching calls, and then slowly, I began to transition them to her. I went from coaching nine hours a day to three to four hours per day and ultimately not at all. I invested the time needed to ensure Julie understood our clients, our sales systems, and the importance of results… and then I got out of the way and let her do her job. Within the year, Julie was doing all of our client coaching, and we brought on a second coach.

It would have been easy for me to think that only I could coach my clients; after all, I'm the face of the company. Yet I knew that what the client really wanted was results.

The next job I gave away was my speaking engagements. While most speakers would never consider someone else teaching their material, I knew that our growth was limited by this view. To grow, I needed to replicate myself in all areas of the company. This was probably the most difficult thing I've ever done. Seeing someone else present my program made me feel sick, literally. Yet rather than focus on what she did wrong, I put my energy into what she did right and continued to train and mentor Julie. I quickly realized, once again, that clients didn't need to have me present; what they needed was the training system, and Julie delivered that beautifully. I quickly limited my engagements to no more than two per month and, once booked, told the client that I was unavailable but that Julie would present a fantastic session.

As you can imagine, I had to let go of all ego to allow my company to thrive. Today we have close to 10 coaches and five speakers who travel the nation daily giving presentations. If I had not set out to create coaches and speakers who could deliver better training than me, our revenue would still be confined by the time I personally had to give. Today, to grow, all we need to do is add more coaches and trainers. There are no longer any limits to our growth. Last year's revenues were $4M, and we expect to exceed those numbers this year.

> "The time spent working on the business, I've learned, is far more valuable than the time I could ever spend working in the business."

3 Identify the natural talents and gifts of your A players

The third most valuable thing you can do as the leader of your organization is to work closely with your team to identify their natural talents and gifts. I often ask people, "What do you love to do, what comes easily to you, what is your passion, what are you good at and where would you ultimately like to be in three years?" I'm always amazed by my findings. Upon listening to what people say, I let things percolate in my mind and consider ways we might use their talents to fuel our organization. I truly believe that if I can help people get what they want, our company will thrive.

As a result of these many conversations, what was once exclusively a training company has morphed into a national training, recruiting and marketing firm. While I'm not passionate about recruiting and marketing, specific team members are. More importantly, as I develop my leaders and extract their talents, I make it clear that if they are willing to put in the work, I will provide the resources and support to help them use their gifts to develop a new division if it fits with the company platform. While it took recruiting two years to get off the ground, we have averaged $20K in revenue for the past six months and are turning a profit. This is without advertising or actively selling as we have been working out our systems and developing our expertise in this market as a primary focus. We see healthcare recruiting as one day possibly morphing our training business. What's most exciting is that it started with a conversation with a team member about her passions.

4 Give away your job

The third thing you must do to reinvent yourself as a leader is develop managers who outperform you. Ego, out of the way! When clients request that I come do an assessment of their company, I can say honesty, "I can come, but Michelle does over 100 assessments per year and is much better equipped to do the job than I am." I explain that while I used to be involved in all facets of the company, my role as the President and CEO is to work high level and make sure that our team is trained and capable of delivering world class results. While you'd think people would object, they don't. As executives themselves, most get it.

Working just three days a week, my focus is spent doing what no one else can do, developing my first line of leaders. With training, marketing and recruiting divisions, I work closely with my team to ensure our goals are set and executed and that the team has the tools, resources, and motivation needed to make it to the finish line. I know that when they all hit their goals I, too, will hit mine. It really is a win-win.

If you want to work smart (not hard) and literally work less yet make more, while positively impacting the lives of your employees and clients, consider implementing one or all four of my leadership reinvention strategies today.

A full-time mom with a multimillion-dollar business on the side, Traci Bild built her organization, Bild & Company (Palm Harbor, FL), on just 24 hours per week. Landing on the Inc. 500|5000 2013 list of the fastest-growing private companies in America, she is living proof of her leadership principles at work. Author of 7 Steps to Successful Selling and a forthcoming book, Get Your Girl Back, Traci's passion is helping people to strike true work–life balance and reignite their passion for living.

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CHALLENGING TIMES...PROVEN SOLUTIONS



Jeffrey Gitterman

"On Giving"

In the conventional sense, philanthropy means "love for mankind, usually demonstrated by giving money to, or doing work for, other people." When it comes to financial philanthropy, most people who give generously are those who already consider themselves wealthy. As a financial advisor, I've seen this time and time again, and this makes sense to a certain degree. If you can't support your own family and pay the daily bills, you probably won't be writing thousand-dollar checks to even the most worthy of causes.

A few years ago, I went on a trip to a Land Rover training school in North Carolina. It was quite an experience. You get to drive a car that is smarter than you are when it comes to driving on rough terrain. The instructor told me, "If you're going downhill and you start losing grip, don't brake." I thought he was kidding, but he wasn't. He explained that with this car, you actually had to step on the gas, which is so contrary to everything we are usually taught. If you're flying down a hill and you start losing control, your natural tendency is to step on the brake. But in this car, the trick was to do the opposite. The tires would then grab onto the dirt, engage, and provide the stability and grounding you needed.

Giving also sometimes seems counterintuitive, but it tends to work in the same way. Just when your instincts tell you to try to hold on to as much as you can get, experience has taught me (sometimes the hard way) that you have to completely do the opposite, and find a way to give. This may sound like a simple principle, but it is one that often goes against so many of our deeply imprinted habits. Contrary to what many of us believe, giving is not just an afterthought to success. It is, in my experience, the very key to true success, fulfillment, and lasting happiness.

When I think about giving, I don't just think of it in terms of money. I also think about it in terms of our time, energy, and attention. From firsthand experience, I've definitely learned that simply being concerned about my own selfish needs and desires is a certain recipe for unhappiness, while being of service and giving to others is where true fulfillment is found.

My understanding of the power of giving came about many years ago, when I was just starting out as a financial advisor. One of the initial appointments that I'd have with any new prospective client is what we call in the industry a fact-finding session. The idea is that you are there simply to get information and gather data like their Social Security number, date of birth, place of work, the kind of house they lived in, income, assets, and so on.

One day, I was getting out of my car and about to walk into a prospect's house to try and sell some insurance. I was way behind on my bills, and my mind was going on and on about how much I needed the sale. Desperation poured out of me as I caught my reflection in the car window. I stopped and looked hard at that reflection and said to myself, "Who would want to buy anything from you? Look at how desperate you look!"

I decided in that moment that I needed to drop my desperate, needy attitude and walk into this prospect's house with the attitude of someone who was looking to give without expecting anything in return. I dropped my worry about having to make a sale, and I began to listen very deeply to what these prospective clients really wanted and needed. And as I approached more clients this way, my meetings started to transform, and my success as a financial advisor grew exponentially.

Although it sounds like a bit of a cliché, I was able to see firsthand as I was going through my

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own crisis around wealth and success that the more I gave to others, the more I received in return. I quickly began accomplishing more in the world, and my income grew substantially. In addition to starting my own financial firm, I became the chairman of the advisory board to The Autism Center of New Jersey Medical School and also started a fund-raiser that we now hold every year, which to date has raised over a million dollars for autism research.

Currently, my frame of mind going into any meeting is: how am I needed here? Often at business meetings, when the other person comes in, I can see that they are largely focused on what they are going to get out of it. And such a person expects to meet someone on the other side of the table who is coming with the same mentality, who is going to fight for what's in it for them. But if you are able to approach this kind of situation with an unconditional mentality of giving, it completely defuses the situation and provides a better opportunity for a win/win outcome.

Unfortunately, too many of us spend our whole lives waiting to get something from the world so that we can show up as the person we always knew we could be. Deep in our hearts, we think there's something missing. But when we flip that mindset, we discover that by becoming a giver rather than a taker, we can change the world, literally, one person at a time.



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—Roz Kirby Walker

How to get more done



7 Surprising strategies for getting more done

#1 – Eat Foods the Help You Focus

Developing and carrying out successful business plans requires great thinking, and great thinking requires a healthy brain.

The brain makes up only 2% of your body weight, yet it consumes roughly 20% of your body's energy when at rest. This means that the human brain needs a lot of good nutrition to stay alert and focused throughout the day.

With food playing such a vital role in the health of your mind, it's important to choose the right foods. What you eat breaks down into nutrients (or toxins) that your body either uses to nourish the blood or expels as waste.

So which foods can help you focus best? You might have guessed it—fruits, whole grains, nuts and vegetables. WebMD, in its research, has found that these "superfoods" can increase your chances of maintaining a healthy brain and boosting your cognitive functions.

#2 – Move Your Body to Clear Your Thoughts

Without exercise, the mind can't work as it's designed to. It can't respond with the sharp, quick action that will give more effectiveness to its powers. Exercise in the open air not only renews vigor to your body, but also relaxes your mind, allowing you to think clearer. According to an article in the *NY Times,* "exercise appears to build a brain that resists physical shrinkage and enhances cognitive flexibility." And exercising in pure, fresh air helps the blood to circulate more healthfully through the system, imparting a degree of serenity and composure.

Business owners who spend much of their time planning, meeting, and engaging in constant mental activity, need rest and change. Often you are tiring your brain without any physical exercise, and as a result, your mental effort becomes restricted. You then fail to accomplish more of the work you might have done had you taken time for physical activity. The answer? Schedule in time for exercise.

#3 – What to Drink that Improves Intellect

When there's a need to work early, late or long hours, it's easy to reach for a cup of coffee to fuel you and to help you stay alert. What you may not realize is that there is another beverage that is more beneficial to your body and your mind.

The brain is 80% water and drinking water keeps you thinking clearly. Research shows that drinking other beverages more than water can put "an overwhelming osmotic load into the blood stream, making it sticky and flow poorly."

Water is the only beverage that can create the right environment for blood to flow smoothly, help regulate blood pressure, and encourage a healthy vascular system. Keeping your body well-hydrated and knowing what and when to drink are essential to your mental health.

#4 – Get More Sunshine and Improve Your Mood

Have you ever had a day when you just didn't feel very upbeat? Maybe there was a lot on your mind? Feeling a little stress? Perhaps feeling down? Or a little irritated or angry? These types of feelings can impact you more than you know.

You see, the brain talks with all the cells in your body, so if you have a negative thought, belief or feeling, your brain sees this as a threat—that something's wrong. Your brain then screams "threat, threat, threat!" The end result is your body starts to spit out stress hormones which puts you in the fight or flight mode—a place you don't want to be when making business decisions or dealing with customers.

One way to improve your mood is by spending limited time in the sun. Sunlight promotes a sense of well-being and elevates your mood. By getting daily exposure to natural sunlight, you will boost melatonin output and improve your sleep. When combined with exercise, sunlight also does much to prevent and treat chronic depression by producing serotonin, which lifts the mood.

#5 – Set Limits that Help You Achieve More

Running a business comes with many pressures. Pressures to keep up with competitors, please customers, and hire the right employees can threaten to weaken even the strongest business owner. With so many competing priorities, many begin to feel as if there is not enough time for necessities like relaxation, rest or even sleep. Many work late into the night or into the wee hours of the morning just to keep up, sacrificing their health in the process.

According to Mark Mahowald, a professor of neurology at the University of Minnesota Medical School, any amount of sleep deprivation will diminish mental performance. He says, "One complete night of sleep deprivation is as impairing in simulated driving tests as a legally intoxicating blood-alcohol level."

But there's good news. You can avoid this trap by setting appropriate limits. One important limit to set is how late you stay up. By getting adequate sleep, you enhance your learning and memory. The key is to schedule your day around 7 to 8 hours of sleep. You'll be amazed at the difference it makes in your work.

#6 – Inspire More Than You Sell

Social media is a great vehicle for building relationships and attracting ideal customers. However, many businesses use this method of marketing incorrectly. Instead of creating and nurturing relationships, many bombard their followers with poorly crafted marketing pitches.

The people within your social network are there because they recognize their need for relationships. Medical data reveals that relationships matter. In fact, people who have a strong social network have half the rate of heart disease compared to those who are lonely. So your community of followers need you for relationship first. And they need you to inspire them to get better.

Your marketing messages should be crafted in a way that builds relationships, speaks to their needs, helps solve their problems, and inspires them to become better. Your marketing goal should be to inspire your followers three times more than you try to sell to them. Then you can show them the relationship between your products or services and their deepest desires and needs.

#7 – Create a Plan of Action

The seventh way to get more done pulls together all of the strategies into a nice, neat plan. Without one, you may do a lot of activity, but miss the mark in ultimately achieving your goals. The following 5-step strategy will help you create a winning marketing plan, save time and get more done in your day:

5-Step Strategy:

1. Work on yourself first—achieve optimal health by implementing numbers 1 through 6 above.
2. Determine who you are gifted to best serve. You'll save time by directing your promotion efforts only to those who are your ideal customer.
3. Identify your key marketing triggers—those pains, desires, or needs of your ideal customers that you will address in your marketing messages. By tailoring your marketing to speak to these triggers, you zero in on those you can best serve, getting more for your marketing dollars.
4. Determine how you will package and confidently broadcast your solutions in the most efficient and effective manner.
5. Create your personalized marketing blueprint—those daily action steps you will take to get your marketing message heard and attract your ideal customer.

By implementing these seven strategies, you will find that you can get more done in your day while improving your health.

Former corporate consultant and trainer for State Farm Insurance, Roz Kirby Walker left her 9 to 5 and founded Covert Social Media, a national inbound marketing business that helps small business owners create and effectively market client-attracting content.

She specializes in Social Thought Marketing™—the scientific link between your body and mind, and the marketing strategies that trigger action. She uses her 5-step Social Thought Marketing™ Strategy to help small business owners get their message heard while increasing website traffic, social engagement, and business profits. You can learn more about Roz by visiting: www.CovertSocialMedia.com.

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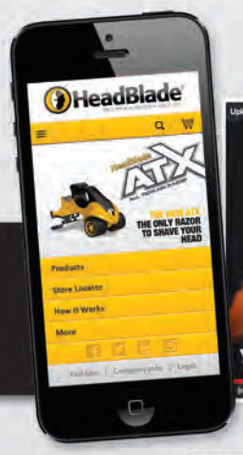
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Clear & Present Dangers:

Why Small Businesses Should Worry About Cyber Attacks

—Dhugael McLean

Many entrepreneurs who have built businesses up from small beginnings know there are certain stages you go through as you grow. Hand written ledgers become spreadsheets, and spreadsheets are ultimately replaced by full-time accounting staff and G/L software. Every company goes through evolutionary steps. It's all part of a growing process for most companies.

We in the technology services industry, however, are often taken aback when we see that the computer and/or network security of a company hasn't gone through the same evolution despite widespread coverage of cybercriminals successfully infiltrating the systems of large companies and governments. Just because you are a small business doesn't mean you don't have valuable electronic assets to steal. Manufacturers have designs, publishers have customer lists, online stores have credit card information, and most businesses have banking or accounting details somewhere in their systems.



Dhugael McLean works for Support.com, Inc. (NASDAQ: SPRT) a leading provider of cloud-based technology services and software, helping brands create new revenue streams and deepen customer loyalty through programs that enhance their customers' technology experience.

Cybercriminals target security vulnerabilities like neighborhood thieves, by going business to business testing the front doors to see if they are unlocked. When cybercriminals find something open or unprotected, they wander in and have a look around. Cybercriminals use automated programs to test your main connection to the Internet for open doors. Later, the cybercriminal will go back and look more closely at what was discovered by the automated program.

Some cybercriminals are looking for a place to plant a program that sends spam emails, others might be looking for accounting information or credit card data, and still others might be looking for trade secrets. These cybercriminals supply a global market of interested parties who depend on illicitly obtained information.

As companies grow, a common security mistake is failing to secure access to the corporate network. As companies start hiring employees, they might add a small business server. The business continues to grow; and while the network is a little slow, it's not a big deal. Employees complain that it's a hassle to get on the server, so the network and password policies may be set up more for convenience than security.

For many of you, this will sound very familiar. It's also the point where vulnerabilities begin to increase, and this is the point where Support.com's partners are asked to help—typically because a business has infected computers that need to be fixed.

When our technology specialists remotely access the infected computer(s) and see all of the vulnerabilities, it can be pretty mind boggling: work machines with personal information; servers that don't require logins; routers with security holes. According to a 2012 Parks Associates survey of small businesses, the top two computer problems are slow PC performance and issues with viruses/spyware.

There comes a point in the evolution of a small business where computer and network security must be re-evaluated. As a businessperson, you understand the value of your company. You understand how much it costs to run it for a day or a month. You know how much it costs when you have an employee sick for a day. But are you aware of the value of the data in your network? How much can you afford to lose in time or information?

As a businessperson, you understand the value of your company. But are you aware of the value of the data in your network?

Consider this scenario: a small business hires a sales executive who needs a notebook computer. The company allows BYOD (Bring Your Own Device), so when she joins the company and asks to use her own computer, it's approved. She sets up the notebook exactly how she likes it and takes it everywhere. According to the SANS Institute "Annual Mobility/BYOD Security Study" (2012), 61 percent of enterprises allow staff to bring their own devices to work.

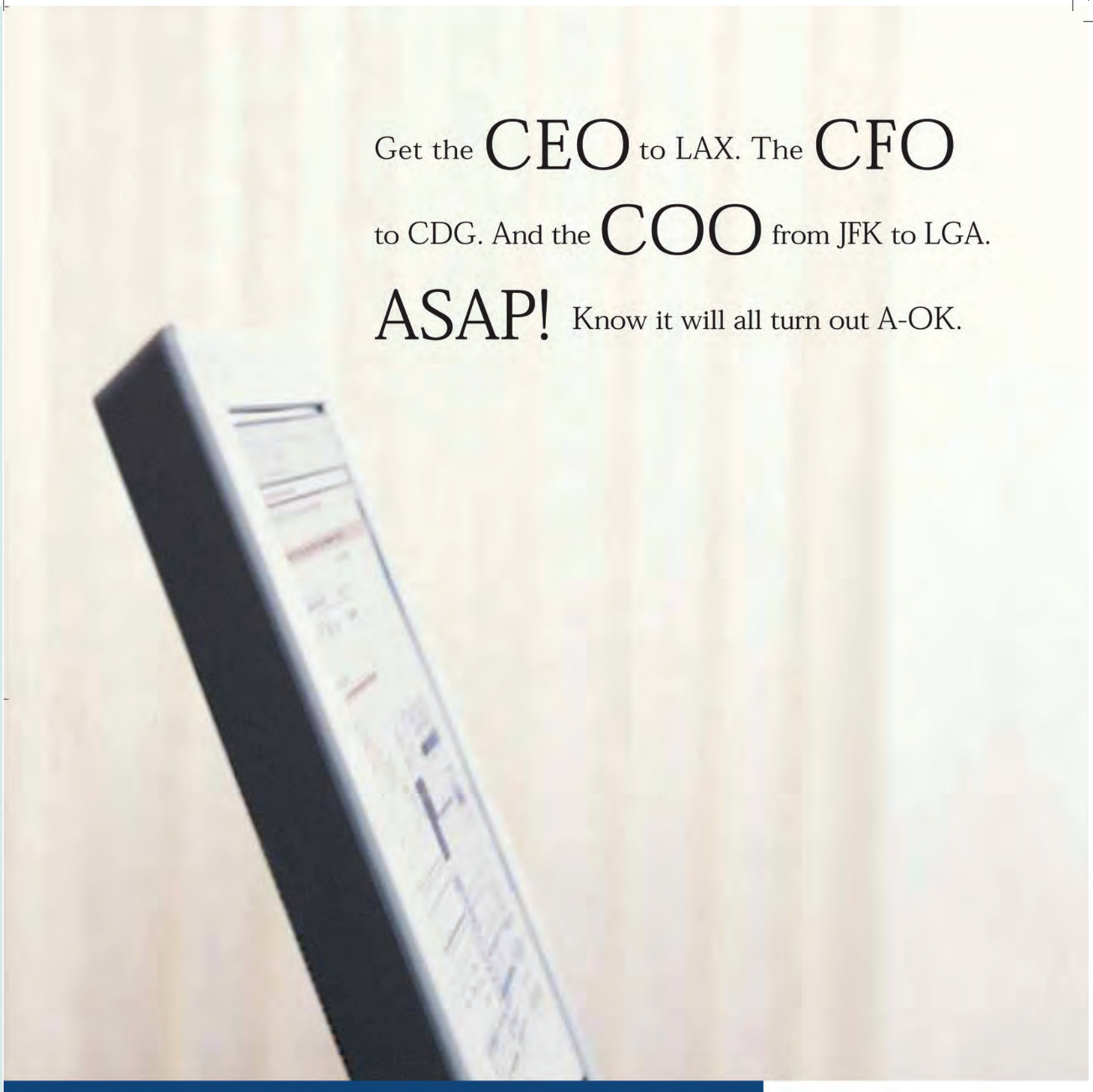
The problems begin when the sales executive lets her son borrow the computer and he accidentally clicks on a bad link: "Click here to see who unfriended you! Free!". Unknowingly her son has allowed a zero day virus to infect her computer. A zero day virus is malware so new that many antivirus programs are unable to provide protection until the new virus is researched and its signature recorded for future detection. Unaware of what happened, she takes her computer into work the next day and reconnects it to the company network. Unfortunately, there are no passwords required for any of the company's shared folders.

The link her son clicked on has installed malware that runs silently in the background and can do a number of things. The malware can look for other unsecured computers on the company's network and infect them, and it can ask for instructions from a remote cybercriminal who's been waiting for a signal from the rogue program. The malware is now inside your company's network and has full access to your unsecured data.

Because of the determination of cybercriminals, it is difficult if not impossible for antivirus solutions to be perfect. Therefore, solely depending on antivirus software to secure your company's network and data is a mistake made all too often.

Protecting against cyberattacks may require changes in how your employees use technology. Focus your energy on securing your data as more employees use their own devices. Create common sense BYOD security and usage policies. Secure your corporate network. Enforce strong password policies. Educate employees about the risks of social networking, malware, phishing and other cyberattack strategies employed by hackers.

As a small business owner, you have enough to worry about while growing your business. You don't have time to understand all the paths that could make a network vulnerable. Don't be shy about taking full advantage of technology service programs and security professionals who can consult with you and help implement best practices that will grow with your company. While achieving 100 percent security is next to impossible, every effort should be made to minimize the risks to your company.



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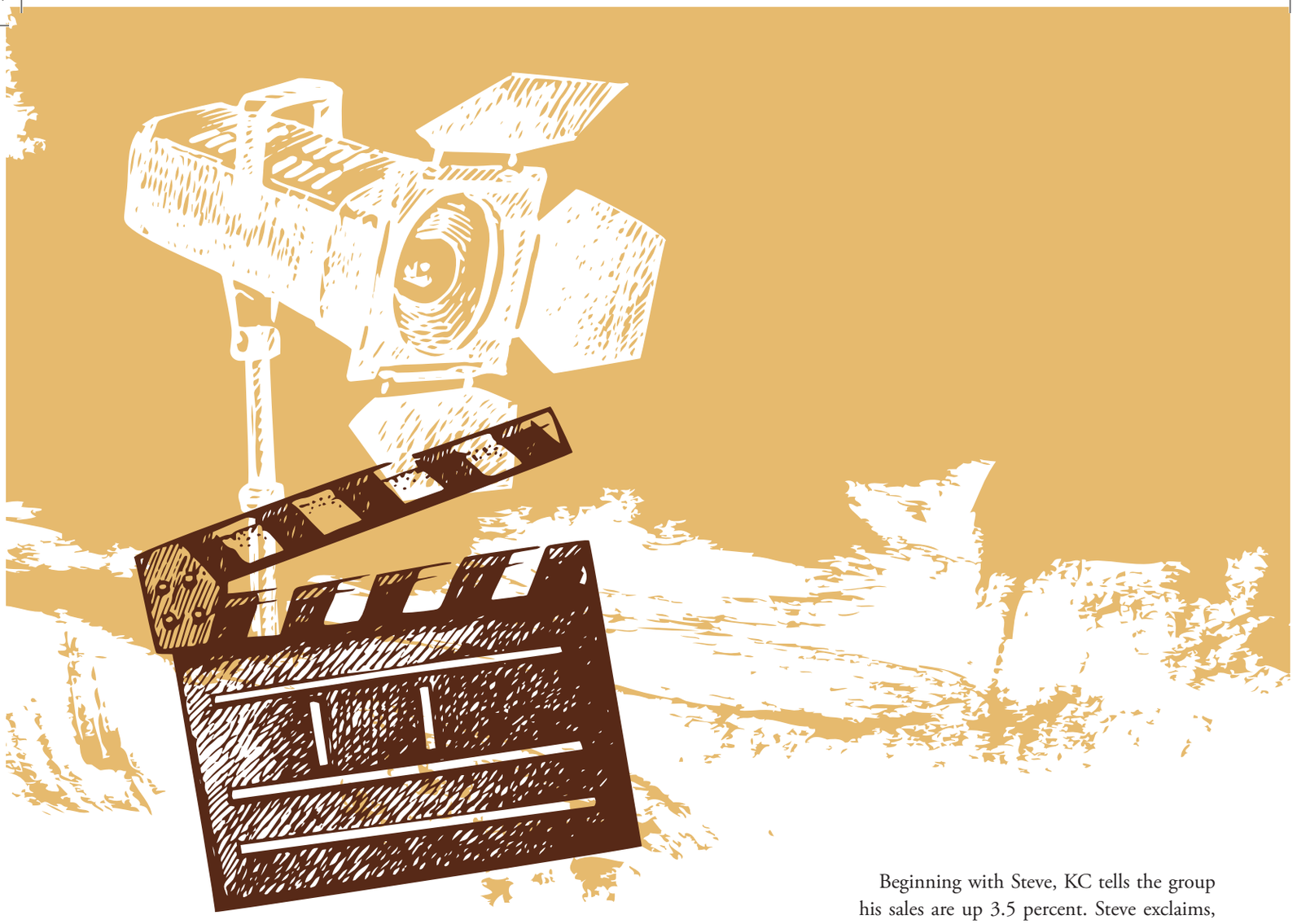
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Sales Lessons from the Big Screen

—Suzanne Paling

The movie *The Jone$es* (with Lauren Hutton, Demi Moore, and David Duchovny), features a three-minute scene that should be required viewing for anyone aspiring to or currently managing salespeople. Sales executive KC holds a meeting with sales manager Kate and the three sales reps she manages: Steve, Jenn and Mick. Sporting a chic black suit and pearls, KC delivers a visually interesting, detailed, and informative presentation reviewing their sales over the previous 30 days.

Beginning with Steve, KC tells the group his sales are up 3.5 percent. Steve exclaims, "Alright!" and turns to his sales manager Kate for a fist bump. Kate shoots him a withering look instead, which confuses him. KC continues the presentation, breaking Steve's sales down by product line. He's up 4 percent in sporting goods, 2 percent in watches and 3 percent in golf related merchandise. KC moves on, praising Mick for his 16 percent increase. Steve's grin slowly fades. Mick realized a 13 percent increase in video games as well as a 21 percent increase in sportswear. Kate congratulates him for "opening up the market."

Next, KC recognizes Jenn for her solid 14 percent increase. With a smile and a little fanfare, KC salutes Kate, at 20 percent overall, as top producer. Much of Kate's success comes from a 24 percent increase in cosmetics. Steve looks chagrined, now understanding why Kate looked less than pleased with his 3 percent. A full 10 percent behind consistent producer Jenn, Steve lags back even further from Kate and Mick.

So, what happened? Why did Steve go from

cheering his three percent increase to looking uncomfortable? Because KC did what a lot of top performing sales executives do: posted the sales rankings, spoke with reps individually, and provided insight into how the top performers surpassed their quotas.

Public accountability. When KC showed the sales results to the entire sales team at the same time, none of them could refute the evidence. Assuming territories are reasonably well balanced and all reps have similar tools at their disposal, publicly displayed statistics force underperforming reps to ask themselves, "Why am I not performing as well as or better than my peers? What are they doing that I'm not?"

Charts and graphs like KC showed her group instinctively tap into the competitive and driven nature of salespeople. In *The Jone$es*, we discover Steve was once a professional golfer. One imagines he enjoyed playing to win against other strong golfers. His bottom of the pile finish feels innately wrong to him.

Holding reps accountable in a public way helps make leading the group easier for sales managers. KC's job becomes less complicated when salespeople like Steve realize, without a confrontational argument with their manager, that most of the responsibility for their sales results lies with them. Steve's mortification at his below average performance motivates him to up his sales game. KC doesn't have to work as hard to try and get him to reach the next level.

Holding individual discussions. During a one-on-one post-sales meeting chat, Steve looks right at KC, listening carefully to what she has to say. He needs her advice and suggestions. With the results shown to the whole group, Steve can hardly deny his last place performance. Numbers don't lie, and he has little interest in being shown up again. After their talk, while rhythmically hitting one ball after another in his indoor simulated driving range, he considers his poor performance. Steve's a bright, intelligent, articulate person—like many salespeople. And eventually, he comes up with a clever idea for increasing his sales. (But I won't give the whole plot away.)

Many managers find that displaying the sales performances of the team changes the nature of discussions with underperforming reps. Some, maybe for the first time, seek their boss out, saying, "I saw that three people finished ahead of me, and I'm upset about it. What can I do? Do you have any ideas?"

An enthusiastic and sincere response on the part of the manager such as, "I'm glad to hear you asking questions like that. Let's work together on this," creates a mutually respectful atmosphere. Reps enter the discussion more willing to listen and be coached. Most seriously consider to giving some of the new ideas a try.

Even if they don't approach you first, you still have greater leverage during any conversations. In a case where your coaching or suggestions usually meet with resistance, you could say, for instance, "Sarah, in looking at your ranking within the team, how do you explain that three reps finished ahead of you?" Defensive comments or excuse making get countered with statements like, "He faces the same lousy economy in his territory," or "All three sold 10 percent more of Product C than you did."

> Publicly displayed statistics force **underperforming reps** to ask themselves, *"Why am I not performing as well as or better than my peers?"*

When managers remain unemotional and stick with the facts during conversations like this, reps with a history of ignoring coaching or suggestions of any kind sometimes open up to the help being offered.

Providing insight. Showing more sales management best practices in *The Jone$es*, KC offers a detailed analysis of how all four reps reached their sales goals. Had KC not told her, Kate wouldn't have necessarily known that her increase in cosmetics sales pushed her over the top. Seeing Mick's 21 percent upsurge in sportswear might encourage Jenn to bolster her efforts in that area. Mick's numbers prove it can be done. Jenn could ask Mick, "How did you move that much sportswear? What do you say to people?"

Over the years, I've observed that sales reps rarely help one another proactively. Some don't want to be bothered. Others don't think it's their place to get involved. Many feel awkward coaching a peer. If asked for advice by another rep, though, the majority of salespeople will offer recommendations and suggestions. Being able to ask specific questions like, "How do you introduce Product C into the sales conversation? What objections do customers have? How do you respond?" helps the underperforming rep to approach the more successful teammate.

Sales isn't always a fair game. Most employees don't have to face a public showing of their performance compared to their peers. The lack of fairness cuts both ways, though. Salespeople often have the opportunity to earn more money than most other people in the company, and their job offers a greater amount of freedom and flexibility than most other positions. With that money and freedom comes accountability.

Suzanne Paling is the principal consultant of Sales Management Services, a consulting and coaching firm offering sales management advice to growing businesses (www.salesmanagementservices.com). She's the author of *The Accidental Sales Manager* (www.accidentalsalesmanager.com), published by Entrepreneur Press. Download a complimentary copy of her Accidental Sales Managers Guide to Hiring at http://salesmanagementservices.com/pdf/Hiring_Guide.pdf.



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Mastering the Art of Healthy Business Relationships

10 Don'ts that Destroy *Life-Changing* Connections at Work

—Van Moody



Let's face it, business relationships can be tough and some even adversely impact careers and the bottom line. Although relationships are a fundamental aspect of the human experience, our dealings with co-workers and superiors, as well as clients and customers, are often riddled with strife and consternation. Difficult workplace relationships are far more than a nuisance, as they can cause anxiety, burnout, clinical depression and even physical illness. What's more, highly toxic workplace affiliations can undermine your professional success and threaten your livelihood at large.

The bottom line is this: the right relationships can propel you to great heights of achievement; the wrong ones will tether you to mediocrity and mire you in disappointment. With this in mind, in striving for rewarding connections with others, it's essential to evaluate relationships intelligently: What makes a great relationship? How do you keep a relationship great? What are the warning signs of trouble? While it's so very easy to blame the other person in a distressed relationship, it's far more effective to consider and assess the situation objectively and build your Relational IQ.

Field expert Van Moody is the author of *The People Factor* (an upcoming release by publisher Thomas Nelson) and a motivational speaker who advises on matters related to relationships as they pertain to friends, family, significant others and the workplace. He is a "People Scholar" who helps others build their "Relational IQ" to achieve success at home, in their social circles, and in business. He may be reached online at www.vanmoody.com.

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What is Relational IQ?

Relational IQ is the mindset that helps us to better understand and control our professional relationships to maximize happiness and realize life-changing success. Relationships are an art, and most of us lack the skill and mastery to help break—or all together avoid—destructive patterns, disrespect, and deception. Far too many people also lack the ability to have productive connections with others—those that help you achieve goals, sharpen your mind, and generally uplift and enrich your life.

There are, in fact, fundamental principles for interacting with others in the complex and ever-changing dynamics of today's culture that, if adhered to, can best assure relational success in business. Choose not to and suffer the consequences. Naysayers might ask, "Is it really possible to master relationships?" The answer is an unequivocal "yes"—if you're willing to learn skills and proactively apply tactical techniques, that is.

To help kick-start your Relational IQ so that you can better navigate, and begin to master, your own professional affiliations, here are 10 pitfalls to avoid when seeking to develop and manage positive business relationships that will result in greater success and overall enjoyment in the work environment:

1 **Don't hide.** While secret identities might be fun in the movies, a person who harbors secrets, and hides their fears, and beliefs from others, will never be able to enjoy an authentic relationship. Being real and authentic with others and even making yourself vulnerable from time to time can foster tremendous emotional connections, including all-important trust, and forge unbreakable bonds.

2 **Don't tweak the truth.** Studies show that 10-30 percent of applicants admit to "tweaking" their resumes—that's certainly no way to start an engagement with a new employer. Small white lies will do nothing but undermine and compromise any relationship. Even slightly altering the truth is one of the most destructive forces that can permanently damage a personal or professional relationship. Keep your work relationships transparent and honest to build trust with your superiors, colleagues, and customers.

3 **Don't rush and miss critical red flags.** Understand that a relationship is a journey with changes in direction, twists and turns, and roadblocks along the way. It's imperative to pass through certain experiences and navigate through difficulties to learn from these situations and create a healthy outcome. Resist the desire to take shortcuts or race through certain aspects of a relationship. Even if it is painful or boring, embrace it, knowing that it offers a healthy purpose for the big picture of a relationship.

4 **Don't force it.** There's an old R&B lyric that says, "If it don't fit, don't force it." Despite the poor grammar, it is quite insightful in its simplicity. Relationships that create positive synergy through mutual respect and shared values are worth your investment.

5 **Don't repeat the past.** The past should not define a person, and there is no reason to keep looking back. While previous events and actions might be a life lesson, the nature of every journey is to move forward. Don't repeat those actions that did not produce the intended results; instead, focus on new choices that will "effect" a more desirable outcome.

6 **Don't be a "taker."** All relationships involve give and take, so it is important to recognize when each relationship could use more of a giving spirit. When we think about what we can do for others instead of what they can do for us, we get to the very heart of healthy, successful interactions. In a strong relationship, both people willingly give far more than they take.

7 **Don't stay in an unhealthy relationship.** Unfortunately, sometimes we make a poor choice and enter into relationships that will never be healthy no matter what actions are taken. Part of Relational IQ is knowing when and how to end a toxic relationship. If someone is not able to accept a change in the status or direction, is not loyal and stable under pressure or in the face of challenge, or had once been dependable but now is unreliable, these are strong clues that the relationship may not be worth saving. Whether it is a customer or client, a colleague, or your workplace, don't let feelings of misplaced guilt or sympathy get in the way of making good personal choices.

8 **Don't lose personal power.** There are situations in the work environment where healthy relationships with unhealthy people are necessary. Developing a higher level of Relational IQ will help to identify those unhealthy people and harness personal power to not let those people hurt, disrespect, or transmit negativity such that you are affected by these attempts. Instead, personal power can be used to turn the tide on those unhealthy people and maintain your resilience and composure to stay the course.

9 **Don't forget who and what really matters.** The most valuable people aren't always the most visible. People of true value bring fulfillment, not frustration. All too often, those taken for granted or overlooked are veritable lifesavers or ones that silently help us achieve goals, provide encouragement, or offer important insights and connections.

10 **Don't accept everyone.** The people around you right now are setting the course for next week, month, year and possibly the rest of your career. Accordingly, there must be a qualification and selection process for those you choose to be around. Blocking the wrong people is the only way to make room for the right people who help you achieve your dreams, enrich your lives, and create a happy, satisfying experience.

Fundamentally, every relationship you have influences you. There are no neutral relationships; each one lifts you up or weighs you down. They move you forward or hold you back. They help you or they hurt you. Only by cultivating your Relational IQ—knowing which is which and how to turn the tide on those that are negative—can you then take the appropriate action. Not to be taken lightly, these actions and decisions can make the difference between a great, happy work life or one that is riddled with disappointment, failure, and regret.

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Proactive and Collaborative Planning for Event Safety

—Phrantceena Halres

With so many headlines noting dangerous or even deadly events, safety is on the minds of many no matter where they go—and that includes both public and private events. That means meeting and event planners must now regard personal safety as an integral component of their planning and preparation. There are many things to think about that will help prepare for—and hopefully prevent—any situations that could compromise the safety and security of conventions, trade shows, and other group events. Here are a few tips for putting event safety first.



Employ Your Sixth Sense: The sixth sense is the unseen. While we cannot see it, we can feel it and feel the results from it. Unfortunately, many people have lost touch with this sense because of hectic lifestyles that cause people to pay less attention to what's around them, leading to a narrow focus on consumption. The imagination and creative process is put on the back burner while most of us just try to address short-term issues. In the meantime, there are people and groups out there that have nothing but time to think up terrible things and plan out their strategies.

Having a mental practice that anticipates what these terrible things might be and tuning into the world around us requires a heightened awareness. The sixth sense may be employed before an event to prepare for what could happen at a convention. As well, the sixth sense may be used while the convention is taking place to be aware of the environment, enhancing the

potential of spotting any suspicious activity. If something does not feel right, then it should be addressed immediately because there is more than likely a reason for that feeling.

Take a Collective Approach: Everyone needs to be involved in the process of planning for event safety—from the client and the convention site hosts to all staff and participants. Everyone has to contribute to ensuring safety. This includes those on-site who can serve as the eyes and ears, employing their sixth sense to be alert to their surroundings down to the maintenance staff of the building and even those attending the convention. Each person involved should have an assignment or component of the safety preparedness plan. This helps divide and conquer all areas that could be compromised with an event, including identification for convention staff, participants, and visitors, as well as the on-site security team.

Share the Knowledge: It is important to have open conversations about safety and security. While no one wants to think about the worst case scenarios, it must be done in order to plan properly and create contingency plans for all types of scenarios. The idea of knowledge sharing goes even farther. If a person hesitates because they think something might not be quite right, then they should talk to someone about it.

For example, consider the cab driver in the recent Boston Marathon bombing. He held the book bag but did not know that he passed off the bomb that eventually killed those at the event. He was simply trying to help get the bag out of the cab. However, every situation now requires more suspicion. If that suspicion is there even as a passing thought, it should be discussed with someone else. It could mean the difference between safety and disaster.

Secure What Matters Most: It is critical to prioritize what needs to be secured whether this includes business assets, sensitive information, or critical infrastructure. In the case of events and conventions, it is important to secure all visitors and participants as well as the business assets present. Once you have defined what matters most, then it is time to look at how those things are vulnerable within the convention or event environment so you can put the appropriate measures in place to secure them.

Keep it Simple: Focus on three or four strategies for safety and security, including visible security staffing, knowledge of chemical security strategies to identify any potential terrorist activity, and evacuation measures that are necessary for any type of bombing or shooting. Having too many strategies means that none will be done well.

Be Proactive: Too often, strategies involve reactive tactics rather than proactive ones. Get to know the floor plan of the convention location as well as areas that might be compromised. Have a strategy for evacuating the convention hall or event space. Walk the space, and meet with the location staffing. Familiarize yourself with the available emergency and police teams in the area of the event to coordinate efforts in advance. Provide all participants with a plan that outlines precautions and contacts in case of suspicious activity.

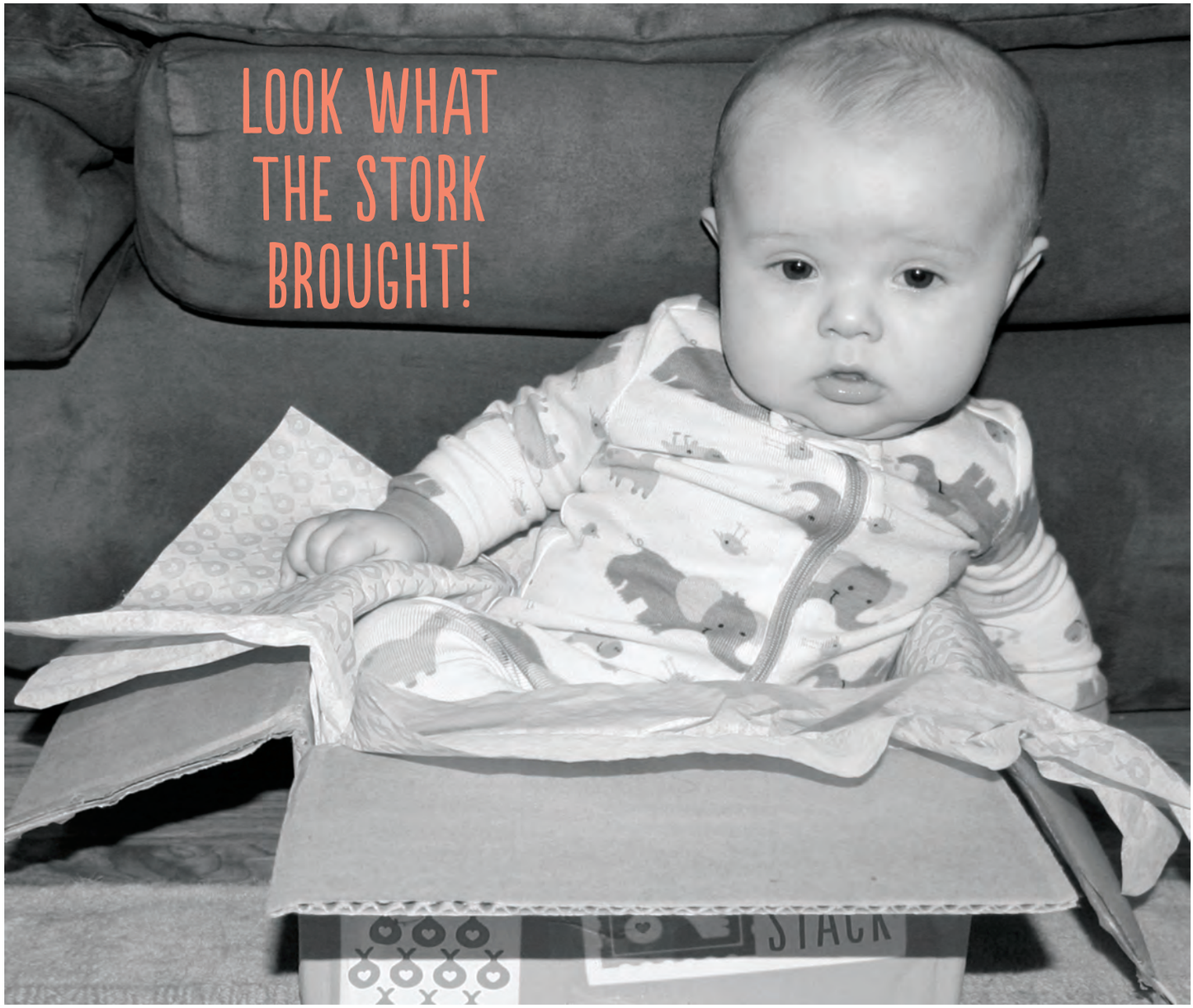
Customize Your Plan: There is no single one-plan-fits-all conventions and events strategy. Every plan has to be unique because no event is quite like the next. There will be different locations, points of entry, number sof participants, and potential safety concerns. While the basic processes and tactics can serve as a framework, the other components will need to be adapted to fit the new environment.

Set Benchmarks: Always circle back at the end of an event. Revisit how the safety measures were implemented and how well they did under the circumstances so that you can learn from each event, evaluating what is effective or what should be improved. Building safety and security is a learning process, that can be facilitated by reflecting upon what has been done in order to increase preventive action in the future.

While some advice with security might be to use common sense, common sense alone is not necessarily a formula for success in the day and age when many attacks seem senseless, and some of the scenarios might have never crossed our minds. From movie shootings to bombings at public events, we have to start thinking beyond the ordinary about what could happen—even if it seems hard to imagine.

Anything is possible, so you must have a proactive safety and security plan that can be customized and that involves all stakeholders in the event. Most importantly, it is about employing the sixth sense, which allows us to look at every situation on a different level and connect with those instinctive feelings that can mean the difference between success and failure—possibly life and death—to all involved.

As founder, chairman and CEO of Total Protection Services Global, Phrantceena Halres leads the nation's only certified security services company focused exclusively on high threat/close proximity safety and security services for the protection of critical infrastructure assets in the corporate, government, nuclear, energy and personal protection sectors. Through her philanthropic, community, corporate, speaking and media efforts, Halres is a lauded security and safety advocate who tirelessly works to enlighten the public on the many ways security improves our lives. She may be reached online at www.total-protections.com.



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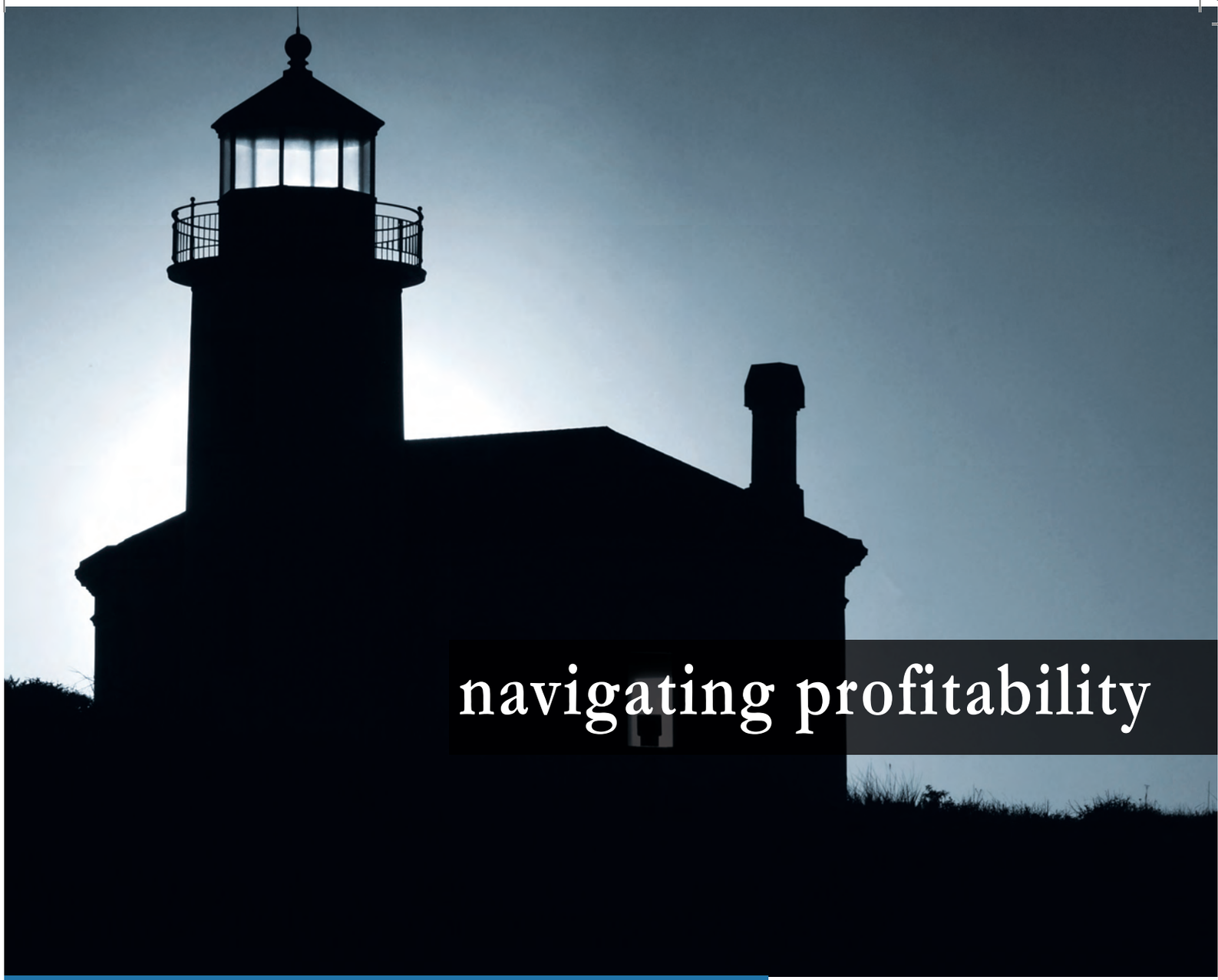
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5 Ways to Realize Greater Room Profitability

—Paul Stennett

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Responsible for storing and distributing data among employees and customers alike, servers are the backbone of just about every modern business. Of course, this type of mission critical power comes at a cost; however, if you strategize your server farm with a budget boosting mindset, you can realize great cost savings in the long run without sacrificing efficiency or performance. Here are five ways to squeeze more ROI out of your server room.

1 Proper cooling

Cooling is extremely important to the overall energy costs of your server room. With all the power a server generates, it's going to take more than the integrated fan to keep it cool. There are many ways your cooling situation may become compromised, both inside and outside the cabinet.

Believe it or not, poor cable management is one of the most pervasive causes of overheating, downtime, decreased component service life, and increased labor times and costs. Proper installation of cables from the get-go keeps the air flowing freely, increases visibility, provides strain relief, and makes swapping equipment a breeze. This often ignored facet of network installation can make or break your setup, and it requires very little outside help.

Many installers make the huge mistake of packing a certain number of cabinets with high power draining, high heat generating servers while filling other cabinets with passive patch panels. This is not a good idea. Failing to balance out the heat in your cabinets can lead to hot spots in your server room, which makes one portion of your cooling system work a lot harder. This, of course, causes much more energy use to keep that area cool (plus shorter service life on all components involved).

For several reasons, server cabinets are the world's biggest dust magnets. Accumulated dust can clog your fans, block air to your equipment, and cause overheating as a result. Having your server room cleaned top to bottom on a regular basis is sure to save you lots of money and trouble in the end. Also, be sure to keep the doors to your server room sealed to help keep dust out and improve overall cooling efficiency.

When installing your servers, make sure cooling needs are accurately calculated. When adding any equipment to your server room setup, it is imperative that you recalculate your cooling needs according to the additional energy consumption (heat production).

2 Managed power distribution

Because heat is generated only by devices that are running, there is much money to be saved by powering down devices when they no longer need to be running. This can be very difficult to do when you're not in the building. For businesses that don't need all engines going 24/7, power distribution units (PDUs) provide the option to safely shut down certain machines at the times of your choosing. And the most advanced models give you full programmability by each individual outlet. These PDUs can be fully software integrated into your system for easy and full control of your entire power situation. Even better, an efficiently managed PDU will pay for itself in a few short years.

Solar power is an option that is now becoming very popular. Though expensive to install, solar systems will pay for themselves in a few years. To add even more safety to your investment, the photovoltaic batteries that solar power systems use are generally guaranteed for a quarter of a century. The only downside is that the availability of solar energy depends completely on the weather. Surely, Tucson is a much better place to harness solar power than Seattle.

3 Considering affordable but reliable equipment

With so much at stake, many IT installers will choose the top brands when selecting equipment. While this strategy will probably provide the performance you need, it doesn't mean the same performance and reliability could not be achieved more affordably. Before automatically equating price with performance, try checking out popular forums like www.serverwatch.com and www.spiceworks.com for professional equipment reviews. You might find an affordable Dell server that is tested and proven to perform just like that Cisco you almost bought.

Though it is nice to be prepared for growth so you are not overwhelmed, you simply don't need an 18×24 room full of top of the line servers for a small business with a handful of employees. Buy only what you need to run your operation, adding a bit of headroom just in case. Too much of a good thing can certainly be bad.

4 Future-proofing

When it comes to information technology, standards are extremely difficult to pin down. Even so, when buying equipment, cooling systems, and cabling, it's best to think about the future whenever possible. Becoming thoroughly knowledgeable about upcoming trends in the industry will prove to be a massive benefit to profitability. It is often not much more expensive to build a server room using standards geared towards the future, but it is always expensive to buy lots of equipment only to replace it in a year.

5 Virtualizing servers

Virtualizing your servers is a great way to make the best of your resources. Instead of buying additional servers, virtualization allows you to partition the resources while masking the physical location. For example, if you're using a dual core processor server, it can easily be made to appear and operate as 2 separate servers. This instantly saves you money by requiring you to buy half the hardware you would need without it.

Bottom line, though, you need not be the expert. If IT isn't your field and you've got other responsibilities, consider a consultant. The cost of professional guidance today can save you money tomorrow by getting just the right equipment for your needs and keeping it running smoothly for a long time. But whether you are the IT expert at your business or you're hiring the IT expert, the topics here will help you know what to look for in your server system.

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—Jesse Laflamme

A Third Generation Approach to Sustainable Farming

Growing up on the same New Hampshire farm that my great-grandfather worked 100 years ago gave me an appreciation for family farming that has stayed with me. I learned to raise chickens by working on the farm, and I knew from the beginning I wanted a humane farm with organic produce.



Growing up on the same New Hampshire farm that my great-grandfather worked a hundred years ago gave me an appreciation for family farming that has stayed with me. I learned to raise chickens by working on the farm, and I knew from the beginning I wanted a humane farm with organic produce.

One of the great strengths of a family business is the immediate access that the next generation has to shape the course of the business. A successful second-generation family business will be stable in most instances. While business stability is a virtue, innovation and hunger for growth are equally crucial for long-term success in the current business climate. The third generation can be the driver for change and reinvention.

For two generations, Pete & Gerry's had operated as a regional conventional egg supplier producing a commodity; however, as our industry consolidated, we remained small and lost our ability to compete. Pursuing the only option for survival, my parents began to transition our business away from commodity egg production and into niche organic egg production.

I joined the family business in the early stages of the transition and felt as though I had an immediate connection to our small but growing consumer base. I believed in what we were becoming. As the third generation to run our family egg farm, I had the opportunity to influence the direction and growth of the business at a very pivotal transition. I came into our business with a perspective more aligned with our consumers than with our industry.

Can farming benefit the environment and the economy?

Running this business without sacrificing my commitment to small-scale farming, organic foods, humane treatment of animals, and sustainability has been a consistent challenge. But by producing eggs sustainably and ethically, we're doing exactly what our customers expect of us. To be sustainable, farming must focus on energy and environmental conservation. Having a sustainable food supply for our children and grandchildren depends on it. Small family farms can lead the way to more sustainable agriculture.

But the quest for profitability has made farming very energy inefficient; farms use a lot of energy. Farming has become more focused on productivity and mechanization than conservation. Farming has also been environmentally insensitive. The overuse of pesticides has created pesticide-resistant weeds and insects. The overuse of commercial fertilizers has created a deficit in nutrients and micro-components in the soil, which then requires more fertilizers.

And like any business, farming also generates a lot of waste—from packaging to animal waste. This impacts both energy use and the environment.

In addition to providing safe nutritious foods, small farmers live on their farms and preserve the surrounding environment for future generations. And because they have a vested interest in their communities, they're more likely to use sustainable farming techniques to protect natural resources and human health.

So rather than becoming a large, centralized farm, Pete & Gerry's has recruited small family farms to join us as suppliers. We have grown from one small family farm with two flocks and a small regional market into a multi-million dollar business producing eggs in partnership with more than 50 family farms producing eggs for us in seven Northeastern states. They're all good, hard-working people who are committed to family farming.

How can one small farmer make a difference?

The first step is for all of us to become aware of our energy use and our environmental impact. Then take successive steps to make changes. Farmers can set an example as responsible stewards of the land. We can conserve energy,

> We have grown from one small family farm with two flocks and a small regional market into a multi-million dollar business in partnership with more than fifty family farms.



protect the environment, and still make a good living.

At our farm we're using energy conservation to lower our energy costs and improve profitability. We switched from incandescent to fluorescent lighting in all our buildings. We turn off the barn lights during the day and use natural light from windows instead. We installed a digitally controlled cooling system that uses outside air to dramatically reduce our energy costs for cold storage. And we schedule our deliveries to coincide with pickups from our family farms to save fuel.

Our goal is to become a zero-waste facility. We installed a cardboard compactor on site so we can recycle cardboard waste. We recycle our plastic cartons. We compost our hen manure using an in-vessel composting system and share it with local farmers for their fields.

I take pride in my small part in making the world better for all of us. As an organic farm, our requirement for organic feed keeps farmers in business raising organic grains. I like knowing that a few thousand acres of corn or soy will not receive pesticides or commercial fertilizer to feed our hens. And I look forward to not having the rubbish truck come to our farm, and instead send all waste back to our suppliers. Collectively taking small steps is how small family farms can make a difference in the environment, local community, and economy.

Does humane farming cultivate good business?

We're also finding that good animal husbandry is good business. I've learned from working with chickens over the years that these birds have definite behavioral preferences. A humane cage-free environment with plenty of good food and water causes our hens to be happier, healthier, and more productive. Chickens in cages simply can't act like chickens. They're very social creatures that like to congregate in groups with a pecking order. Most hens choose an area within the henhouse to eat, roost, scratch, and lay eggs; and then they pretty much stay in that area.

Humane farming does not have to be inefficient. Pete & Gerry's combines chicken behavior knowledge with the latest technology to compete with the larger factory farms. Smart use of automation benefits our efficiency and productivity, which is essential as our business is spread over multiple small family farms. Pete & Gerry's Organics strives to create a natural, low-stress environment for our chickens. Humane farming pays off because humanely treated animals are healthier.

Is food production moving towards a community model?

Although investing in small family farms and humane certification is more expensive than consolidated factory-farm production, it lets family farmers hang on to their land and livelihood. Pete & Gerry's creates opportunities for small family farmers to produce eggs from humanely treated hens in a long-term partnership premised on strict standards of sustainability for the environment, the local community, and the well-being of the animals involved.

Food production is controlled by what people buy. As consumers become more aware of farming techniques, they can encourage humane animal treatment by the way they shop. They can show they're willing to pay a little more for humanely treated animal products.

We believe this model is the future of sustainable food production—small farmers producing food that is efficiently distributed to families who cannot or choose not to produce their own food. The bottom line is simply that we provide better food while treating the animals in our care with dignity and respect. That's good for our animals; it's good for our communities; it's good for the future of small family farms. And that's good business.



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How to promote company culture through your workspace

—Kevin Kuske

A company's rich culture can often be hidden in a sad workspace. Sure, you might have a casual dress code and a spirited softball team, but no one will think much of it if you're surrounded by plain, white walls on a daily basis. With the ongoing debate around remote workers, it's important to understand the role of the workspace and how you can leverage it to enhance your company's culture, creating a space where workers want to be.

A great workspace is more than a desk and a chair—it encompasses a number of elements that make workers feel comfortable, inspired, and productive; and it serves as a representation of the company's values and ideals. It gives the first impression to potential employees or business partners.

Of course, great space is subjective. But Turnstone has studied a number of high-performing small businesses that boast highly productive, well-functioning workspaces around the country. Turnstone has discovered common elements that help a company tell its story through their workspaces. Use these tips to tell your story and create a thriving culture in your space.

1 Find a space that enables culture.

- Spaces with personality. Seek out places that are architecturally interesting—with high ceilings, raw floors, exposed bricks, natural light—or those with an element of surprise.
- Open floor plans. Nothing is worse than filling a beautiful, open space with cubicles. Encourage the flow of communication and collaboration by maintaining an open space and enabling buzz. If voices are quiet and guarded, you're not doing it right.
- A palette of places and postures. Different types of work are done best in different settings. Be sure your space offers areas for both "me-work" and "we-work." Workers need a mix of desk, private, lounge, and hospitality spaces.

2 What do you stand for?

In order to create an authentic space that represents your company and employees, you need to identify your position on various workplace issues and decide what you want your space to say about your business.

Ask your employees about their favorite part of your company culture and play it up in your space. People enjoy the lounge spaces for collaborative work and taking breaks? Make sure the areas have plenty of power sources for laptops and devices (a few pillows wouldn't hurt, either). Everyone loves the bring-your-dog-to-work policy? Create an area with toys and treats for your employees' furry friends.

By embracing the characteristics of your company that your workers love, it will not only keep them happy and productive but also will help attract more people like them. In fact, research has shown great company culture and workspaces can help recruit top talent.

3 Free your employees to be themselves.

The best and simplest way to capture the personality and culture of your company is to allow your employees to be themselves. Encourage your workers to personalize the space by bringing pets, pictures and crazy iconic objects to work. Giving employees the freedom to be themselves sends the message that you recognize people create and share in different ways.

4 Add elements of fun, color, and nature.

All work and no play can have a negative effect on employees' creativity and productivity. In fact, study after study shows that fun is meaningful and plays an important role in trust and creativity. In your office incorporate elements of fun that show your team that fun has a place at work. It does not matter whether it's ping pong tables, basketball hoops, social activities, or video games. What matters is that it is relevant to your team and that daily behaviors support the message that work is an enjoyable place to be. Encourage spontaneous interaction, and plan informal, fun events that let the team get to know each other and relax at work. Just a few weeks ago, our office had a Smoothie Week where a different person brought and made a different smoothie every day.

Color also plays a large role in expressing company culture in your office. A dim space with white walls does not suggest much in the areas of creativity or fun. Consider painting one or two walls a bright color or adding colorful accents throughout the office. Not only will it make the space feel more welcoming, but it can also improve employees' moods. Studies have shown the color blue helps workers feel calm and productive, and red is great for tasks that require attention to detail.

Don't forget nature. Live plants not only make a space feel more comfortable and homey, but also a study from Texas A&M University found that flowers and plants increase workplace productivity and creative performance, too.

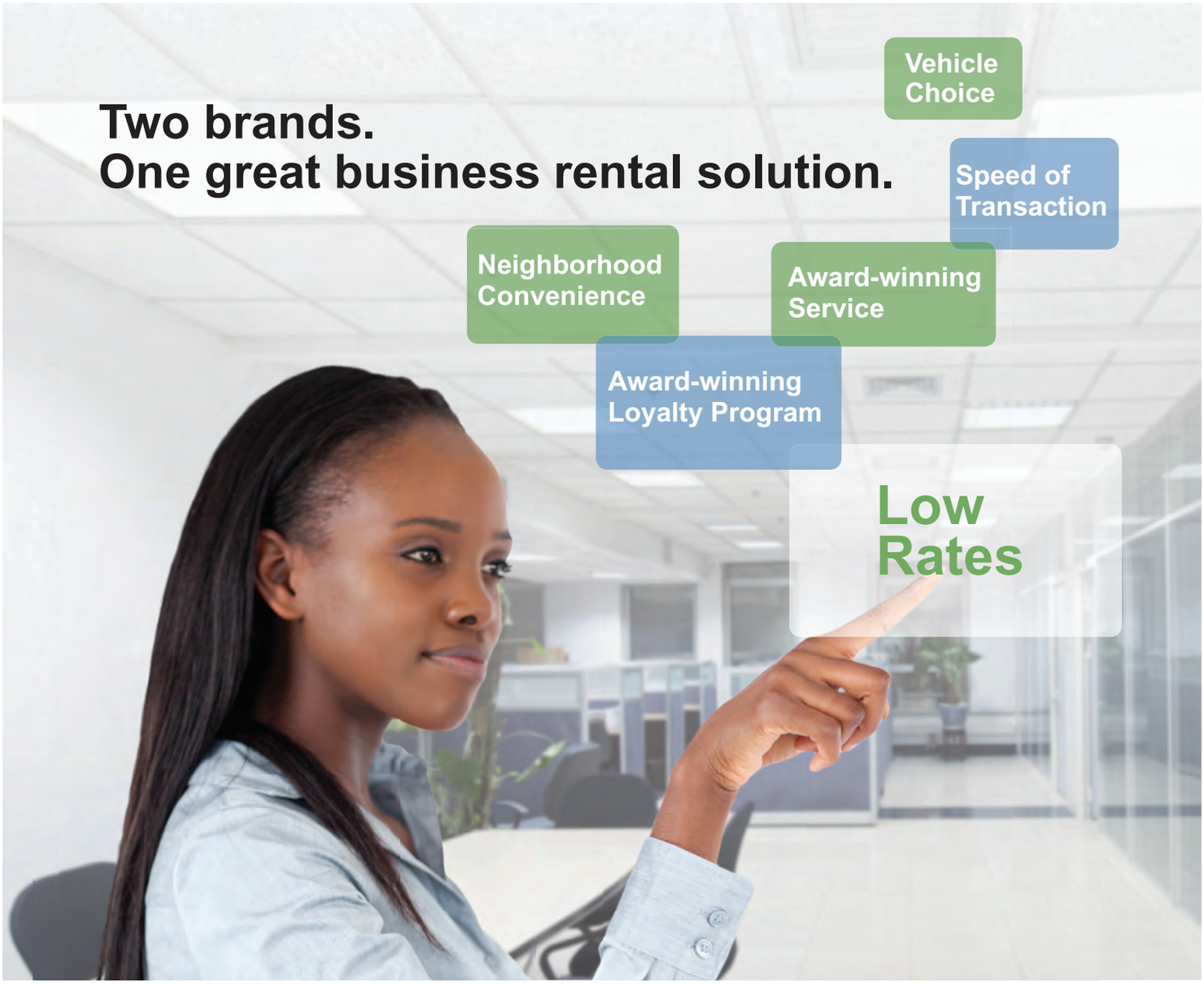
5 Be Hospitable.

The truth is: we often spend more time at work than at home, so it's important for an office to be a welcoming environment for employees. By providing a hospitality area, you send the message that you care about your workers' wellbeing. Provide a station with coffee, mints, ibuprofen, snacks, etc. ,for employees. The spot will serve as a place to find refreshments and a social hub where people can take a break, gather and informally exchange ideas.

Hospitality also extends to guests. Make sure you have a welcoming entrance and waiting area for potential business partners and hires. Provide comfortable seating, magazines or books, a water cooler, or even a candy jar. If you don't have an administrative team member near the entrance, make sure someone can see when guests arrive so they aren't left waiting.

Kevin Kuske is chief brand advocate and general manager for Turnstone (www.myturnstone.com) a Steelcase brand that designs solutions that help create great work environments for small and emerging companies.





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Commercial Real Estate

Looks At Space in New Ways

In the last year, we have developed the mantra: "Seeing with New Eyes." —Jackson Pillow

The new economy tenants understand this and look at space in an entirely different fashion. They want space that reflects their culture, their ethos, and their values. Slowly but surely, traditional tenants are starting to understand this same value system. When it becomes the norm, which I think is coming sooner rather than later, traditional real estate development will be forced to meet the needs of the tenant and change what they build on a daily basis.

I see technology firms fueling the redesign of office space as well as aiding in the emergence of new office markets across the United States. Some of the office space characteristics of these tech firms are spilling over into the more traditional space users—law firms, accounting firms and ad agencies. I expect to see even more of this spillover as businesses will need to adapt to remain economically viable and to attract talented employees. The three shifting trends I find most interesting are: the new definition of Main & Main, the changes in physical design of clients' office space, and the changes in the buildings that house their offices.

The New "Main & Main"

One of the first and most important changes that must be acknowledged is location. Everyone knows the old mantra that the three most important things in real estate are location, location, location. This has not changed. What has changed is the definition of what makes a prime location. Previously we saw clients drawn to locations either very convenient to railroad stations, which brought them into the city from their suburban homes, or a close commute to the CEO's home. (We all know it happens and makes for some strange corporate decisions, like Sara Lee's move to Downers Grove back in 2006.) A prime location to today's growing firms means ready access to public transportation.

As workers have migrated back to living in cities (or never left), we have seen the focus shift to intra-city transportation versus the traditional importance on the suburban commuter hubs. The *Wall Street Journal* notes, "Of the nation's 51 largest metropolitan areas, city centers grew faster than suburbs between July 2010 and July 2011. By contrast, from 2000 to 2010 only five metro areas saw their cores grow faster than the surrounding suburbs." Ready access to food alternatives and urban amenities adds to the cultural enrichment of employees and helps support a willingness to work long hours. We are seeing the C-Suite shift emphasis away from the desires of top management and onto their talent.

In Chicago, for example, we have recently negotiated two leases with very successful entrepreneurial digital design and digital marketing companies. Both of these clients chose nontraditional locations, with one thing in common—immediate access to public transportation, with L train stops literally at their front door. Additionally, 1871, an incredibly successful co-working center in Chicago, is in a 1930s building, the Merchandise Mart, which also has an L stop right on the second floor.



Communication and Its Impact on Space Design

The design of space also continues to change. In a recent interview with a client who had just moved into his new office space, a reporter asked him about the importance of the depth from the window wall to the corridor. My client looked at me quizzically, and my answer was that it was not even a consideration in our building search because his open plan layout did not dictate that dimension as meaningful. For 40 of my 45 years in the commercial real estate industry, planning modules have been a key driver in the design of office space. That's real estate jargon. In simple words: Is the space built to accommodate 10×10 offices or 10×15, or even 15×20? Today, this is not even a consideration for many of the fastest growing firms because offices are not a priority.

Another interesting movement in the design of office space revolves around the concept of communication. Communication has become a special consideration. With the slow extinction of the private office and to some extent the cubicle, ease of communication with co-workers has become more accessible physically. Some forward thinking companies are even taking it to the next level. Traditionally, groups that work together were always adjacent to each other to facilitate communication. Today, we see a growing trend in the complete opposite direction. Departments are more often than not randomly located throughout a space, and there are not adjacencies for those groups that work closely together.

The reason is simple—management of these firms values communication across the entire company. When an employee must walk across the office to communicate with a co-worker, the trip often will result in conversations with other employees, building team spirit and, in many cases, adding other opinions to the discussion. As noted in the memo that accompanied Yahoo's announcement banning its employees from working from home, "Some of the best decisions and insights come from hallway and cafeteria discussions, meeting new people, and impromptu team meetings."

Buildings - What's Old is New Again

This discussion would not be complete without mentioning the structures that house our client's space. As I predicted, the most attractive commercial real estate to today's growing office space users will no longer be the newest, shiniest, tallest, glass/marble/steel high-rise office building. Certainly there will continue to be limited demand for this type of space, but particularly in older cities the repurposing of buildings is a trend that will become even more viable.

Precursors of this trend are the new Twitter headquarters in San Francisco (the former San Francisco Furniture Mart), Google's New York headquarters (a former Port Authority industrial property), and Zappos' soon-to-be-completed headquarters in downtown Las Vegas (the old City Hall). With innovative architecture and interior planning, great historic buildings will help invigorate downtown markets in cities throughout the United States.

Recently, I worked closely with Helmut Jahn, the successful architect and my friend, to envision the "Building of the Future." While I believe buildings of the future will continue to be large, I do not think they will be high-rise tall, but instead will be lower and long, providing the occupants with the ability to relate to their immediate surroundings—letting them continually be in touch with the human element. Inherently, due to the large footprint required, these buildings will surround core areas and will not be in traditional center city locations. Public transportation will remain of utmost importance to these sites.

Energized for the Future

Broadening the definition of location (plus the ability for tenants to locate structures with great character) has resulted in a major shift in the commercial real estate industry. Buildings considered obsolete only five years ago are now considered great potential homes for the new economy tenants. This trend, coupled with the expanding ease of communication, will create fundamental changes in the types of buildings companies of the new economy locate in and where they actually exist. After 40-plus years in the business, it energizes me to see these changes. Now is truly the time for innovation.



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TRAVEL

Key Largo —Tim Cotroneo

Stirring a business that cooks

Hungry Clients are Happy Clients in Key Largo

Julia Child's *The French Chef* was one of the most popular television shows of the 60s and early 70s. Newly married and an aspiring cook, Carole Kotkin found herself mesmerized by Child's culinary mastery. When Kotkin learned her idol would be appearing in her hometown of Miami, she couldn't wait to see Child in person.

At the conclusion of Child's sold-out Miami speaking engagement, television's first celebrity chef asked if anyone in the audience had a question. Kotkin felt this was a once in a lifetime opportunity to connect with the cooking icon. Kotkin asked Child, "What could I do to learn more about cooking?" Little did Child know that her advice to Kotkin would serve as a springboard for a food career spanning four decades of teaching, writing, and hosting a radio talk show.

It was 1976 when Child suggested Kotkin attend a new Paris cooking school named after one of the founders of modern French cuisine. Kotkin was thrilled with the idea of attending the fledgling La Varenne, and she packed her bags to begin training for a career in the culinary arts.

Trends, Wine, and Income Streams

After returning to the U.S. with a culinary degree from La Varenne, Kotkin opened a cooking school in Miami. About the same time Kotkin's school opened its doors, a new wave of premium cooking merchandise and award-winning wines hit the American market. Kotkin thought she could add revenue to her cooking school's bottom line by selling high-end products like the Cuisinart food processor, as well share what she knew about the wines of France and beyond.

Time-saving kitchen products and Kotkin's insights on fine wine were a big hit with cooking school attendees. Kotkin's teaching reputation gained quite a following in the Miami area, and she parlayed this success into magazine and newspaper articles focusing on her favorite recipes.



Marlin Beach on the Ocean Reef Club property



Bucaneer Island on the Ocean Reef Club property

By 1990, Kotkin had sold her school and began devoting more time to writing food and travel articles for several Miami publications. The Ocean Reef Club, a South Florida private club and residential community, reached out to see if Kotkin would be interested in starting a new cooking school. With a fresh game plan in mind, Kotkin started anew at this Key Largo-based club featuring nine restaurants on its 2,500 acres.

Celebrity Chefs

Remembering the drawing power Julia Child had with audiences years before, Kotkin tapped into the high profile chef network she had cultivated during her previous decades in the culinary industry. The Ocean Reef Cooking School began showcasing a chef lineup that read like a culinary Who's Who. Kotkin's high-profile chefs propelled the school into a sold-out weekly event for club members and guests. The audience was literally hungry to learn recipes and cooking nuances from the James Beard award-winning chefs wooed by Kotkin.

Speaking at the Ocean Reef Cooking School became a winning proposition for not only chefs, but also cookbook authors, and winemakers. After teaching audience members how to prepare delicious five-star meals, the A-list cooking stars found the festive three-hour Ocean Reef Club events to be a great place to sell their books.

Kotkin's relationship with food and wine industry legends would serve as a dynamic talent source for her syndicated Miami Herald newspaper column, as well as her Food & Wine Talk radio program. Like the food pyramid designed to create a healthy diet, Kotkin had figured out a business plan in which each of her career moves could meld into a potential revenue stream for the next. All the while, Kotkinwas doing something she loved.

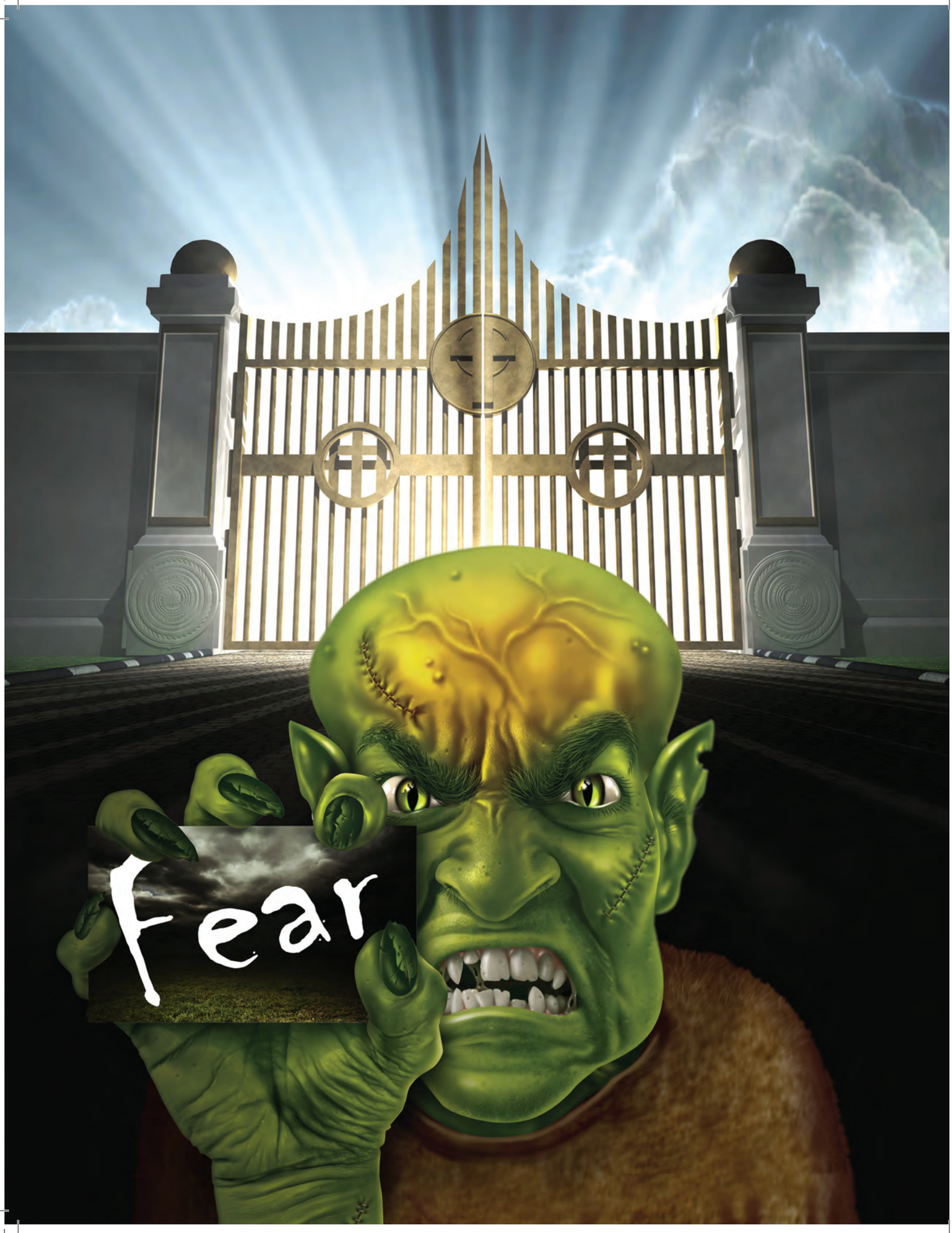
You'll Know When the Recipe is Right

Kotkin's business vision of today seems to run well in advance of her cooking, writing, and talk show calendars. This knack for stoking the business pipeline is particularly evident in the way Kotkin gauges the success of an Ocean Reef Cooking School event. "I love it when students' dinner plates are clean, they have smiles on their faces, and I learn they've already signed up for our next class," Kotkin said.

One way Kotkin's cooking passion stays ignited is by the morsels of knowledge she gleans from her ever-expanding network. Whether she's teaching a class, writing a column, or engaging with guests on her radio talk show, the teacher is always learning.

Julia Child's Miami-raised protégé has discovered that a solid business model isn't all that different from a great dining experience. If your customers receive the best ingredients and exceptional service, and return home feeling satisfied, they'll hungrily come back for more.

Tim Cotroneo is a Minneapolis-based writer specializing in travel, business, and golf.


Fear

Five Ogres and an angel

Guarding the Gates of Organizational Improvement

—Bruce Hodes

With so many change agents, change initiatives, and transformational changes, swarming the marketplace, clearly a lot is changing in business—or is it? In actuality, what makes organizational change a challenge is all that surrounds it, not the change itself. So let's cover how change initiatives in organizations get stuck and what to do about it by addressing the ogres (obstacles) guarding the gates to organizational improvement.

The following five drooling and slimy ogres impede organizational improvement. Once you, fellow executive or CEO, know of and are aware of the ogres, you can improve your organization's performance. You also know what awaits you.

Be honest with yourself as you read this article. See where and to what degree these ogres exist for you and your organization. Actively read the article and get personal value from it. If you find yourself getting defensive, just let it go and face the facts and reality. Be in the moment. Very Zen…

Ogre #1: Fear

People who have never been held accountable are scared of accountability. In most organizations, people are assigned accountability for activities or to oversee activities rather than being assigned accountability for results. Additionally, most people hold themselves accountable for activities not results.

When people are accountable for results, they have to deliver. If they do not, they are failing at their job, and there are consequences, real or perceived. Only a small percentage of people who comprise the workforce have this kind of accountability. For example, commissioned sales people; commissioned sales people cannot feed their families if they do not sell and attain their quotas.

I assert that people, business owners and managers included, resist accountability because they fear not being able to produce the desired results. They fear that they will fail, look bad and have to deal with the consequences. Fear of accountability causes real obstacles for an organization's ability to improve performance.

Accountability causes terror. However on the other side of terror is freedom. If you are accountable you do not spend time blaming or justifying. You can focus and engage in creating results by looking at what steps you need to take to produce the desired result.

Ogre #2: Comfort

Above all, most people just want to be comfortable. People like things to stay the same, even the things they do not much care for (an astounding phenomenon). Now, imagine how it is at work. You get used to your job; you have a certain routine and you feel good about what you do. Then along comes somebody who says, "we are going to do things differently around here. We are going to ensure that everybody has measurable goals that they will be accountable to accomplish." It is a double hit: This change agent threatens your world and your ability to succeed. Many people at work just wish to be left alone to do the job they know how to do.

Resistance to change comes from simply not wanting to adjust to something new. This resistance often blocks willingness to listen to why the change needs to happen. For many people, their first reaction to any change, big or small, is to be annoyed.

The way out of the box is to first understand that you are totally in the box. Being comfortable with a routine is a very human phenomenon. We resist being uncomfortable. The way out is to get comfortable with being uncomfortable. Again very Zen. We like it!

Ogre #3: Broken Promises

People do not keep their promises. Do you find yourself protesting, "I keep my promises!" Then you are typical and part of the majority who think that. We challenge you to spend a week recording all the promises you make, big and small, and see if, in fact, you keep them all. You do not have to say. "I promise" for it to be a promise; just say, "I will" or "okay" to a request. If you say you are going to do something it is a promise.

Most of us believe we are "good" people and we keep our promises. The problem is, as long as we believe we keep our promises, we do not recognize that we do not. And if we do

not recognize that we do not keep our promises, then the chance of getting better at keeping promises and doing what we said we are going to do is slim and limited. Getting better at making and keeping our promises is essential to improving organizational performance.

Ogre#4: Language

The language of improving organization performance gets in the way. Almost all of the words associated with performance improvement have negative connotations. We already addressed accountability, which (to many people) means "somebody is going to beat me over the head if I do not do what I was told to do." Even worse, for many people, the phrase "holding people accountable" means "we are not going to be able to easily get away with stuff."

We do not need to change the actual words; rather, we need to redefine their context. The language of performance improvement needs to relate to accomplishing the organization's vision, initiatives and goals. The opportunity is to shift the context of being a victim and powerless in an organization to one of being a partner and empowered in the organization. We assert that organizations like Southwest Airlines, Google, Apple and Zappos have done this.

Ogre #5: Drift

Organizational drift aids in avoiding discomfort and repeating history. Most people call it "culture," but we call it "drift." What is "drift"? Imagine that you are swimming in a river and stop to float; what direction your body will move in? The direction of the current of course! You will "drift" away. It is the same with organizations. They all have their own drift, which is "how things work around here."

The tendency in organizations is to maintain the status quo; drift maintains the status quo. In most organizations drift is very strong. There is a "no change here" attitude. If you try to change things, it helps to know that this ogre will rear its ugly head and will eat you if it can. Now there is a visual.

Handle the drift as if you were trapped in a canoe grabbed by a rip tide and being pulled out to sea. Grab a paddle and then begin to paddle at an angle, not directly against the tide, so that eventually you can break free.

When dealing with the drift of an organization adopt a similar strategy. Honor the drift and at the same time introduce strong corporate initiatives that will allow the organization to lay new track and move in a new direction. Examples of these kinds of initiatives would be serious adoption of lean manufacturing, breakthrough business planning or adoption of the Keyne Method of dramatically improving organizational performance.

Five Ogres–now what?

When you take on improving organizational performance, you have to know that these drooling, slobbering ogres are at work. If you fail to do so, you will run into unanticipated resistance. Consider this example: A CEO who wants to improve organizational performance decides to run her decision by her leadership team. We can pretty much guarantee that will be the end of it.

Why? Because at least some people on her leadership team are going to nix the idea. These people have sway and credibility. They will say something that sounds intelligent, like, "Our way works. We have tried these kinds of change and improvement interventions before and they do not stick." Or, "We have enough to do without getting into another initiative that supposedly improves performance but only worsens the situation because it is one more thing to do. I do not know about anybody else, but I, for one, do not have the time for this."

If you, fellow executive and CEO, are aware that you will disturb the sleeping ogres, you must decide not to run the idea by your team first. At the very least, trust your intuition and be convinced that even in the face of resistance, this is the way forward. AS leader, you need the vision, intuition, courage and commitment to make the decision alone and to move forward. Then you can figure out how to get your team on board.

Improving and transforming the performance of your organization is not for the faint of heart. The type of organizational transformation that we are describing requires senior leaders that understand they are ultimately accountable for the success of the enterprise.

It is a terrific idea to empower your team and to involve them as much as you can in the decisions that you make. There are just some decisions that you cannot make by going to the team and discussing them. The decision to go forward with implementing real gut wrenching transformational organizational improvement is one of them. Responsibility, comfort, language, broken promises and drift—all of these ogres will stand in your way.

Angel # 1: Performance Improvement

There is good news. The age of performance improvement is upon us! Intelligent and systematic performance improvement plans are being created and implemented with real results. The signs are there. *Three Laws of Performance* by Steve Zaffron and Dave Logan, *Great by Choice* by Jim Collins and *Switch* by the Heath brothers outline some of these ideas and possibilities.

In the past, when speaking to an executive and/or CEO about dramatically transforming organizational performance, one might just as well have been talking about space aliens. Now, organizational change gets people's attention. More and more performance improvement and transformation systems are appearing.

We are reading the writing on the wall here—this age is upon us. This angel will trump the ogres every time! Mark my words. Knowing about the ogres gives you power in dealing with the Ogres. Being in the age of organizational change empowers. Organizational change game on…

Since growing up in his family's boating business to founding his company CMI, Bruce Hodes has dedicated himself to helping companies grow by developing executive leadership teams, business leaders and executives into powerful performers. Bruce's adaptable Breakthrough Strategic Business Planning methodology has been specifically designed for small-to-mid-sized companies and is especially valuable for family company challenges. In February of 2012 Bruce published his first book *Front Line Heroes: How to Battle the Business Tsunami by Developing Performance Oriented Cultures.* With a background in psychotherapy, Hodes also has an MBA from Northwestern University and a Masters in Clinical Social Work. More info: bhodes@cmiteamwork.com, 800-883-7995, www.cmiteamwork.com


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How Software Audits Are Significantly Impacting the Bottom Line

—Julie Machal-Fulks

Many software publishers have discovered that auditing their customers can result in increased revenue. Publishers initiated hundreds of audits in 2013, and many unsuspecting audit targets learned that audit resolutions can be extremely costly. In many cases, the auditors approach the technology team and get responses quickly, before the team involves legal counsel or other resources. To avoid overpaying as a result of an audit, companies need to establish an audit response plan and communicate it to all of the employees that may receive the audit notice. Failing to have an audit protocol in place in advance of an audit can result in unanticipated five- or six-figure settlements.

I. Software Audits are Increasing

Software publishers interested in generating additional revenue often develop comprehensive software audit programs designed to review their customers' compliance with software licenses. http://www.ey.com/Publication/vwLUAssets/Software_asset_management_survey/$FILE/IT%20COMPLIANCE%20WITHOUT%20TEARS.pdf. The software publishers' justification for initiating an audit is generally an audit provision in the main or supplemental license agreement. What many companies do not realize is that it is possible to negotiate the terms of the audit provision at the time of the license purchase. But, it is extremely difficult to negotiate new terms after a company receives an audit notice.

Software audits are usually conducted by the publisher itself, third-party audit firms, or in limited instances, the publisher allows the audit target to conduct its own audit. Technology professionals that receive audit notices frequently provide the publisher or auditors with information without realizing the legal or financial implications of their response.

II. Responding to Audits Can be Costly

Publishers regularly contact their customers, and many professionals that receive the first contact from the publisher or auditor about a software audit do not realize that an audit request is fundamentally different from other types of information requests. Often, the technology professionals treat the audit request like a routine or minor inquiry. If there is a long-standing relationship between the publisher and its customer, the professional that receives the audit request may believe that the company will be treated like a trusted partner.

This is not the case. In software audits, the auditors are not impartial—they work for the publishers. The auditors will interpret all data in the light most favorable to the publisher. The auditors often seek information to which they are not entitled, use pre-audit agreements to expand the scope of the audit, and employ questionable tactics like extrapolation. Before conducting their own investigations and often before notifying anyone else in the organization, professionals that receive audit notices respond with raw data. In many cases, after the technology team receives a demand from the publisher for payment of tens of millions of dollars in licensing fees, penalties, and interest, then executives learn about the matter for the first time.

To help reduce the risks of an unexpected software audit expense, companies need to ensure that everyone is prepared for the audit before a publisher gives notice. Having an Audit Response Plan can go a long way toward preparing for an audit. The plan should outline the process everyone should follow upon commencement of an audit and identify an executive audit sponsor, preferably in the legal department. The audit sponsor should require the team to work together to conduct an internal investigation assessing the potential exposure before the auditors collect any data.

III. Audits Need to Be Escalated within an Organization Immediately

The first step that recipients of audit notices need to take is to consult the Audit Response Plan and notify the executive sponsor. The executive sponsor should work with the legal team or outside counsel to address a number of pre-audit issues, including the scope of the audit, the timing, concerns about data collection, and remedies at the conclusion of the audit. In some instances, the auditors will allow the target to prepare a self-audit report, which can save a great deal of time.

Before any material is presented to the auditors or publishers, the executive sponsor will want to ensure that the auditor or the publisher has the appropriate confidentiality agreement in place to protect any of the company's information that may be disclosed as part of the audit. Publishers often object to the inclusion of audit-specific confidentiality terms, particularly when there is a non-disclosure or confidentiality provision in the license documents. However, depending on the audited company's business (e.g., health care or financial services), such an agreement may be required before an audit can commence.

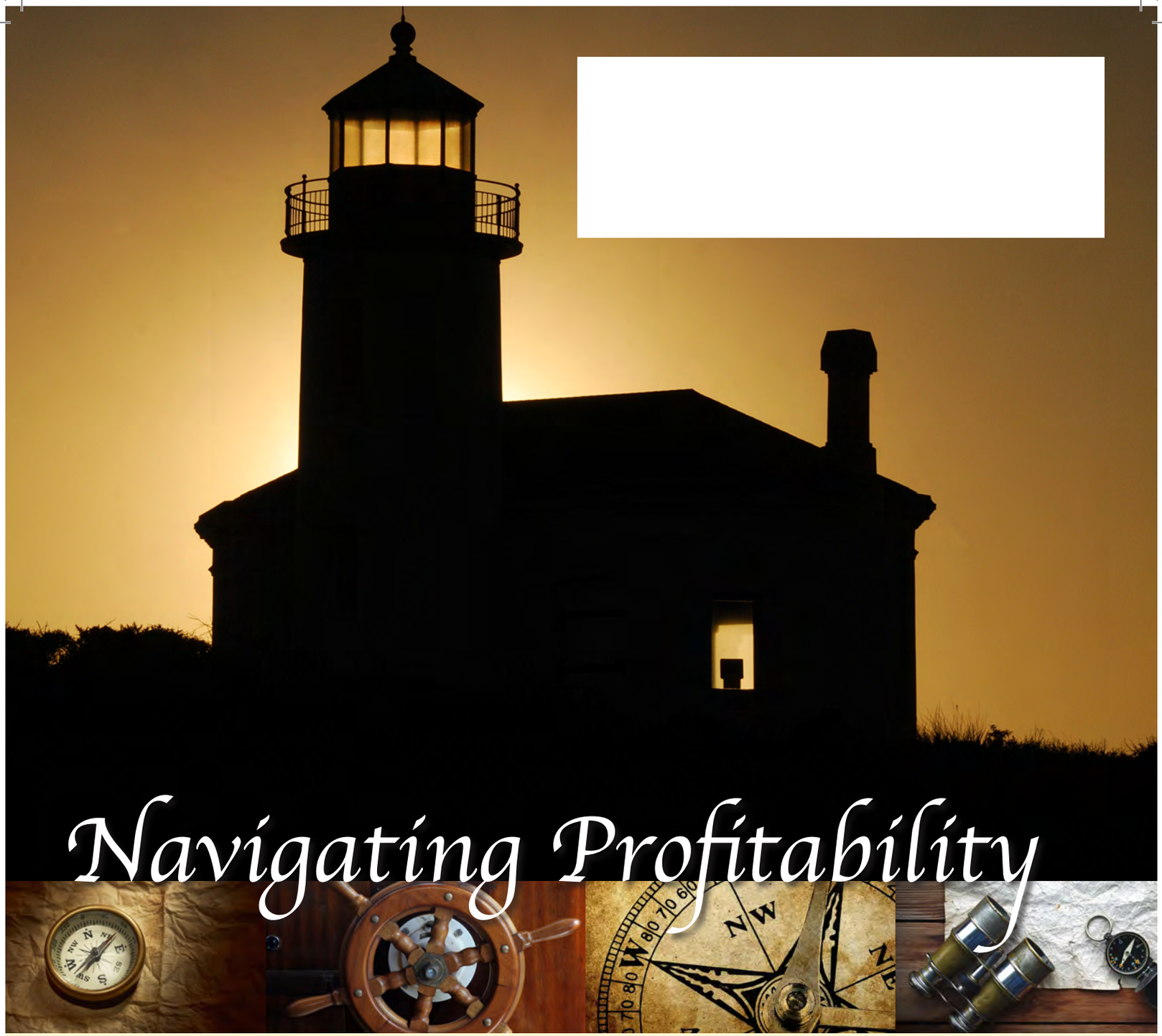
Once the appropriate agreements are in place, and the materials have been provided to the auditors, it is critical that the company review the audit for accuracy. Ideally, all objections should be made before auditors transfer the final license review information to the publisher. After the publisher receives the completed data, it is difficult to present objections.

Finally, the company may want to review the potential exposure related to the audit early in the matter to identify an appropriate reserve to resolve the audit. Failure to involve legal and financial executives early in the audit to conduct an internal investigation and evaluate potential exposure can result in an unpleasant surprise if a software publisher makes a large financial demand.

Julie Machal-Fulks, Partner, Scott & Scott, LLP



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