


THE POWER OF OPERATIONS

9 EXPERT INTERVIEWS ON WHAT SUCCESS IN
OPERATIONS MEANS



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The Power of Operations Ebook was created to highlight best practices, issues, insight, and decision-making for successful operations inside of Facility Maintenance companies.

In this Ebook every expert has answered the following questions:

- What does success in operations mean?
- What are key metrics you measure for success?
- How does weak operations hurt a company the most?
- What do you look for when building a powerful operations team?
- What are some of your best practices for Client Satisfaction?
- How do you present to leadership when implementing a new initiative?

How can you make the most out of this ebook?

- Read through this ebook without taking any notes.
- Re-read and pick 3 strategies or philosophies that you would love to implement for your company.
- Take action

Company: Zoe Facility Services
Name: Gavin Scott-Miller
Role: Director of Operations

01

WHAT DOES SUCCESS IN OPERATIONS MEAN?

Success in operations for me is creating processes and systems that convert constant problems into efficient solutions that you don't need to think about. If you are able to get ahead of the problems that arise in a systematic, measured and documented way then you are being successful in operations. Operations processes have multiple steps one needs to think through but when your team and yourself are able to execute these without having to think about it, you have built a successful operation.

02

WHAT ARE KEY METRICS YOU MEASURE FOR SUCCESS?

Key Metrics are dependent on what the process impacts at the end. There is no one metric to measure overall, it's important to understand the questions below to understand the metrics to measure.

- What is the end result of this initiative?
- How much time would it take to measure success there?
- Which departments and how many people will be involved?
- What would be the cost & expected ROI of this initiative?
- Which departments will it impact the most and how?

03

HOW DOES WEAK OPERATIONS HURT A COMPANY THE MOST?

They hurt the business in many ways but the main for me is Control. If a Director of Operations doesn't have the right delegation, correct budgeting, documented processes, and systems to support the success of the department then it loses control of what is happening. If there is a lack of control then you can find different areas beginning to "smoke" - lack of labor control, spending too much, unprofitable jobs, or lack of client retention which eventually turn into fires.

04

WHAT DO YOU LOOK FOR WHEN BUILDING A POWERFUL OPERATIONS TEAM?

Our work can be Complex, but not complicated therefore I look for:

Flexibility, Willingness to Learn, Solution Finder, Proactive, and open to asking for Help.

I don't hire someone that is great at finding problems, but doesn't attach a solution or 2 to it. Its easy to point out what's wrong, it's harder to fix it.

05

WHAT ARE SOME OF YOUR BEST PRACTICES FOR CLIENT SATISFACTION?

Set clear expectations with the Client to show them the job is getting done and they don't need to think about the cleaning of the building. I've heard before: "We pay you too much for this to be my problem" - I make sure we aren't creating any additional jobs for our clients and making sure we remove this from their plate that way they crush their current role. If a client needs to manage you, then it doesn't allow them to do their job.

06

HOW DO YOU PRESENT TO LEADERSHIP WHEN IMPLEMENTING A NEW INITIATIVE?

I love this question, and to answer it I would encourage anyone to go back half a step and understand the question of: What is our goal for a specific department this year?

Once you have that, ask yourself: How do we get there? What do we need to do to get there?

These specific questions will then give you the gaps of what you currently have to accomplish the goal and what is needed to get there. Now you can begin vetting new initiatives, softwares, technology, training, etc. An initiative that isn't linked to the end goal, is not helpful.

- P.s. Bring your hypothesis, numbers to back it up, how it links to goal, and ROI to leadership when you decide to present.

Company: Moreno & Associates

Name: Paul Lima

Role: Director of Operations

01

WHAT DOES SUCCESS IN OPERATIONS MEAN?

Success means keeping your customers happy and doing what you give your word you will do. Keeping the relationship with your client strong, and being the source of answers for them even if you do or don't provide that job. Regardless if it's in your industry or not, you help find the answers for them and become the go to Point of Contact for them.

Keeping the client happy and paying attention to the details will make cleaning a non-existing headache.

02

WHAT ARE KEY METRICS YOU MEASURE FOR SUCCESS?

Customer Lifetime Value and Client Retention. I have a museum that we helped open up 27 years ago and they are still my clients today. We measure customer happiness and how long they keep the relationship. Now, within that metric of Retention and Happiness, comes a lot of responsibility on problem turnaround, service requests, quality of work and appreciation of each client.

03

HOW DOES WEAK OPERATIONS HURT A COMPANY THE MOST?

Weak operations hurt our clients the most, and it does impact our client retention. We have 2 types of clients we here:

Internal Clients: Our Management team and front-line workers

External Clients: The companies/buildings we clean.

Weak operations lead to unhappy clients on both ends, causing us to not be able to move towards our vision and build the company we set out to build.

04

WHAT DO YOU LOOK FOR WHEN BUILDING A POWERFUL OPERATIONS TEAM?

I look for 3 characteristics: People person, Honest, and "Whatever it takes" attitude, with the philosophy of: "If it's not illegal, immoral, or unsafe" then we do it.

Experience isn't a must when we are hiring, we are all about building up the right people that have the desire to learn and be more.

05

WHAT ARE SOME OF YOUR BEST PRACTICES FOR CLIENT SATISFACTION?

Listen to the Customers and Proactive approach. Before I visit any clients I review inspections and go around their building that same day to make sure everything is up to standard, if I find anything wrong I bring it up in our meeting to let them know we are on it.

If you wait for the client to complain, instead of bringing it up then you create a reactive relationship vs proactive relationship.

Lastly, we have an open door policy in our company to attack problems together and be proactive in getting our clients any answer.

P.s. Our Operations department we call Customer Service Department

06

HOW DO YOU PRESENT TO LEADERSHIP WHEN IMPLEMENTING A NEW INITIATIVE?

We are a mighty team, we all sit together in a room with reasons we think it's a great idea, review the numbers, what it would take, and how it would improve our company. Once we have the greenlight we go do the research and once ready we bring it up to our CEO/CFO for their executive approval.

Company: BUDD GROUP

Name: Jason Lee

Role: Director of Operations - Specialty Services

01

WHAT DOES SUCCESS IN OPERATIONS MEAN?

We are a business, the first judgment of success is Profitability. Being able to reach profitability comes from having a strong strategy which is influenced by goals. It doesn't matter what department you are in, it's a shared goal with shared responsibilities that gets us to provide a successful service to our client and build a profitable company.

Example: Sales lands the client, HR provides the staff and cross training, Operations services the account... And it can go on and on across departments. Regardless, it's the same purpose which is to be successful.

02

WHAT ARE KEY METRICS YOU MEASURE FOR SUCCESS?

Of course, every Service agreement has its KPIs but we focus on the triple bottom line.

Social, Economic, and Environmental this is how we measure ourselves at the operational level.

- Social - Great people performing great service
- Economic - Profitability
- Environmental - No negative impact whether its indoor air quality, waste, or other impacts.

We accompany that with a successful service to our customer.

03

HOW DOES WEAK OPERATIONS HURT A COMPANY THE MOST?

BRAND - It hurts your brand the most. At the end of the day we are selling a **BRAND**.

In more specific terms it hurts you in 2 ways: Customer Satisfaction & Employee Retention.

• Customer satisfaction:

No one wants to work with someone that can't do what they promise to accomplish.

• Employee Retention:

No one wants to work for someone who can't perform on the field. They feel they are being set up to fail.

What would happen if you can't recruit top talent or retain ideal clients?

04

WHAT DO YOU LOOK FOR WHEN BUILDING A POWERFUL OPERATIONS TEAM?

As a former Football coach, I bring this over when looking to build a strong team.

I call it the 5 C's.

- **Coachable** - Are they ready to be a part of a team and learn to be part of our team?
- **Communication** - Not only can they communicate with our client on what they do but can they cross-communicate with other departments & other stakeholders based on what is important to them? Cross-communicated is an underrated skill.
- **Comradery** - A team environment, all onboard, communicating efficiently unlocks this C. This C is powerful.
- **Commitment** - This is a cause and effect of being able to achieve the 3 C's above.. This will make them your high performers out on the field.
- **Confidence** - All the 4 C's produce Confidence. Your team now has the confidence to go on the battlefield and know they have the skills and the team to tackle all of this together.

05

WHAT ARE SOME OF YOUR BEST PRACTICES FOR CLIENT SATISFACTION?

Our theme for 2023 is "Service is our product and management is our strength". In our industry customers tend to commoditize what we do because they aren't able to differentiate the value. It is up to us to make this visible to the client, communicate it as a product, and show there is an ROI.

Our team has a project management or engineering background to make sure every service is performed at the high level our client expects. It's our goal to remove any burden from the client and leverage our technology for real-time updates, and communication to make this simple.

To identify the best way to serve our Clients we need to understand:

- Identify the customer's needs
- What is the opportunity to handle the need
- What is the solution we can offer
- What is the evidence that we have done it before

Lastly, we integrate our operations and sales to make sure we're always trained to help, and for our salespeople to hold those long-term relationships with the client as well.

06

HOW DO YOU PRESENT TO LEADERSHIP WHEN IMPLEMENTING A NEW INITIATIVE?

We love and encourage new ideas from our team, improvement is super important to us.

The key criteria when reviewing a new idea is:

How do they help us reach our targets and goals?

When presented they need to be under the **S.M.A.R.T. Goal** format?

Specific, Measurable, Attainable, Realistic, and Tangible.

If the initiative can help hit all 3 of our goals which are Social, Economic, and Environmental then it becomes a no-brainer to us

Company: iPro Building Solutions

Name: Edwin Eaton

Role: CEO

01

WHAT DOES SUCCESS IN OPERATIONS MEAN?

If on Monday if we show up and there are no customer complaints, fires to put out, phone calls or emergency emails then that shows me our team executed their role efficiently. As you are growing your business, Mondays usually become your chaotic day, when you show up and as an Owner you can start your Monday building the company proactively vs responding that is a sign of successful operations.

02

WHAT ARE KEY METRICS YOU MEASURE FOR SUCCESS?

Outside of customer satisfaction, our most important is the longevity of our employees.

We have employees that have been with us for 8,9 years and we have been in business for 10 years.

We measure how we are developing our employees (Training), employee conversations, and operational improvements to make my employees' lives easier.

03

HOW DOES WEAK OPERATIONS HURT A COMPANY THE MOST?

Weak operations lower employee morale, and employee retention. Not having the right team and culture hinders your ability to grow a sustainable business, this is why we have a strong focus on employee satisfaction and development.

04

WHAT DO YOU LOOK FOR WHEN BUILDING A POWERFUL OPERATIONS TEAM?

Personally, I love when they have a sports background (it's not a must) but coming from a sports background usually brings an employee that is used to teamwork, pushing their comfort zone, and can communicate to the team efficiently. Military backgrounds are also a great source of employees.

I look for teachability, meaning once they are successful in their role can they find, coach, and train their replacement in order for them to move up as the company keeps growing.

Experience isn't necessary, the will to learn and the hunger for growth is more important to us than anything.

05

WHAT ARE SOME OF YOUR BEST PRACTICES FOR CLIENT SATISFACTION?

We set clear expectations that we will be visiting you and laying out a plan together on what works best for each account and site. Regardless of what the client's expectations are, we find a way to accommodate their request and serve them to our highest ability.

We set these expectations not only with the decision maker but also with those impacted the most from the cleaning which is usually the manager or general manager. We would rather hear: "I don't want to see you so much vs I haven't seen you anymore"

06

HOW DO YOU PRESENT TO LEADERSHIP WHEN IMPLEMENTING A NEW INITIATIVE?

Everyone in my team understands we are an open door policy and encourage everyone to bring initiatives, ideas, technology, or even raises to the table.

The key when you bring anything to the table is understanding:

- What are the facts?
- What research backs up this idea?
- What proves this would be a great investment?

Learn to make a business case and make it easier to whoever you are presenting on the benefits of this idea.

P.s. In new ideas and initiatives, you are going to fail, that is normal in business don't take it personally and learn from any of the mistakes.

Company: Picture Perfect Cleaning

Name: Aaron Graham

Role: Director of Operations

01

WHAT DOES SUCCESS IN OPERATIONS MEAN?

Operations is very people heavy, success is being able to have a process in place that can empower an employee to do the right thing at the right time and follow the steps laid out in place. Step 1 through step 10. This allows us to deliver higher quality to the client and keep our clients happy.

02

WHAT ARE KEY METRICS YOU MEASURE FOR SUCCESS?

We measure our operations team in 3 metrics on a weekly basis:

Number of inspections: This helps us track our Quality Assurance

Custodial Interactions: This is to keep a strong bond with their team

Client Interactions: Show our clients we are here for them

These are great indicators of valuable time spent, if you don't invest time in these 3 categories as an operations manager we can predict there will be problems coming in the future.

03

HOW DOES WEAK OPERATIONS HURT A COMPANY THE MOST?

The morale of the cleaning crew becomes affected the most, and without strong employees, nothing can get done in our business. If our team is failing in providing support and neglecting our team this is the funnel it gets put into:

- Low Employee Morale
- Bad Service Quality
- Unhappy Client
- Loss of Client (Revenue)
- Loss of Employee (Team)
- Ex-Employee tells their network this is a bad company
- We can't hire new employees
- Sales can't acquire clients because we can't staff the jobs.
- We are done

04

WHAT DO YOU LOOK FOR WHEN BUILDING A POWERFUL OPERATIONS TEAM?

Characteristics are:

- Eager to Learn
- Coachability
- Interpersonal skills
- Flexible Schedule
- Great listening skills
- Hard Working

05

WHAT ARE SOME OF YOUR BEST PRACTICES FOR CLIENT SATISFACTION?

One of our unique practices is the philosophy of: Don't bother them if they don't need you, but when they need you it's NOW. We have built our systems to be able to respond within 2 hours of our clients inbound requests. Immediate response.

Another best practice is:

After the first day we clean, we visit the location the next day and walk the building with them to make sure everything is completed to their standards. If anything isn't done properly we send the team to fix the mistakes with no additional charge to the client. We get ahead of the complaints and don't give our customer time to get angry or bothered.

06

HOW DO YOU PRESENT TO LEADERSHIP WHEN IMPLEMENTING A NEW INITIATIVE?

When an idea becomes introduced to the team or brought for approval we would have already thought this initiative through.

- Bring back tests/trials you ran
- Benefits/challenges
- Map out every step of the initiative
- Why the idea is great.
- Present to Team
- Get FEEDBACK from the team and for them to poke holes in it.
- Present to Key Players (Most impacted)
- Approve and Map out the RollOut.

Company: Profit Growth initiative

Name: Mark Anderson

Role: CEO

01

WHAT DOES SUCCESS IN OPERATIONS MEAN?

We measure success by client retention, if we are serving the client by the scope of work in their expectations and renewing their contracts. Turning each contract into an evergreen contract

If we have a client buying more from us, more often, our profitability keeps growing.

If contracts keep being renewed then we are obviously serving the client to high quality levels.

02

WHAT ARE KEY METRICS YOU MEASURE FOR SUCCESS?

We always asked: Are our account managers, supervisors, and cleaning crew doing what is needed on a daily basis to keep our clients happy, engaged, and retained?

We measure reports on account turnover per supervisor, quality control reports by supervisors, quality assurance from Account Managers, and Client Feedback. All these have to match as a validation step for us.

Our process is built from the supervisor up to the account manager.

Quality Control is for the supervisor

Quality Assurance is for the Project Manager or Account Manager to make sure the Supervisors are leading properly and being efficient in what they are doing.

Directors will then compare that with our Client feedback with the 3 questions:

- What do we need to improve on?
- What do we need to do, that we are not doing now?
- What are we doing great at?

03

HOW DOES WEAK OPERATIONS HURT A COMPANY THE MOST?

This is the fastest way to lose credibility with both clients. Clients want to see that you have a strong management team retention and employee retention to fulfill the request that has been awarded to you.

- Weak operations will not allow you to grow or maintain a healthy business.

04

WHAT DO YOU LOOK FOR WHEN BUILDING A POWERFUL OPERATIONS TEAM?

We looked for individuals that fit our culture, values, and drive to want to grow within a company. We hired within the B2B Commercial Service Industry regardless of the niche because they still understood the type of business and kept a facilities manager happy.

05

WHAT ARE SOME OF YOUR BEST PRACTICES FOR CLIENT SATISFACTION?

1. Clear accountability and system set in place from cleaner all the way to CEO. We spoke with the same terminology and all held specific responsibilities within the company to serve our clients the best. We went above and beyond and always aligned the scope of work with what our customers want. When we acquired a client they knew they didn't need to look anywhere else, we had recurring meetings, clear points of contacts, and always validated our value to our client.

How we saw it vs How they see it (Perceived value) - these needed to align.

2. We had internal and external clients. Our employees are our internal clients and we made sure our supervisors understood they were there to serve and develop their cleaning crew. As a CEO I was there to serve and develop everyone in my executive team.

Key: Be proactive and don't wait for the Client to reach out. Have full visibility of your operations.

06

HOW DO YOU PRESENT TO LEADERSHIP WHEN IMPLEMENTING A NEW INITIATIVE?

When someone comes up with a new initiative we need to be provided with high-level numbers and reviews to consider the idea.

For example, if it was a new piece of equipment, key questions to prepare are:

- What are the benefits of the equipment?
- By how much would it improve productivity?
- How much is it?
- What are the reviews and takeaways from others that have used it?
- What was your experience with the vendor?
- What are the expectations for rolling this out?
- How can we validate the idea?

Depending on the size of the investment then we would need to bring this up to the committee which would be a more extensive process for approval.

Company: Sharon Consulting Group

Name: Sharon Cowran

Role: CEO

01

WHAT DOES SUCCESS IN OPERATIONS MEAN?

A self-running business is a real sign of strong operations. If the Owner is able to take a 3-week vacation to Europe and no one is going to miss them. Operations and procedures are in place that runs the business for them. If the owner is dependent on the owner then operations aren't strong. A team that can keep the business growing without micro-management from ownership.

As an owner it's important to step back and see if you are a bottleneck in your business, if the business runs through the owner they are setting themselves up for only short term success but not long term.

02

WHAT ARE KEY METRICS YOU MEASURE FOR SUCCESS?

- Profit & Loss Statement
- Client Turnover Rate
- Employee Turnover Rate
- New Account Closing Rates
- Accounts Receivable

03

HOW DOES WEAK OPERATIONS HURT A COMPANY THE MOST?

Weak operations hamper your ability to grow profitability, if your operations aka the foundation of your company is weak then all of the new business you bring in will not necessarily be a profitable business or stay with you.

Hampers your employees' ability to grow, which will lead to employee turnover.

Weak operations lead to a weak future, weak growth, and for everything you are building to crumble.

04

WHAT DO YOU LOOK FOR WHEN BUILDING A POWERFUL OPERATIONS TEAM?

Hire employees that match the company's core values and can commit to the growth of your company. They need to be on board with the mission and vision of the company.

Hire for attitude and Train on Skill. This always improved our chances of hiring the right employee.

05

WHAT ARE SOME OF YOUR BEST PRACTICES FOR CLIENT SATISFACTION?

- The visibility of your company is important to Client Satisfaction. One of our practices is every time we were on the property doing an inspection, visit, etc even if they didn't have the time to meet we would simply waive by the office.

Lack of Visibility leads to questions. Keep open communication and get creative on how you become visible to your clients.

- Always visit your client after the first clean to assure everything is set and done to client expectations. As one of my clients said: "I pay you to assure this is clean, not for you to ask me"

06

HOW DO YOU PRESENT TO LEADERSHIP WHEN IMPLEMENTING A NEW INITIATIVE?

The process for us is:

- The idea
- The GAP we are fulfilling
- The economics
- Ask for Team Feedback
- Vote on Best Decision for the Company

Company: Janitorial Growth Alliance

Name: Ed Selkow

Role: CEO

01

WHAT DOES SUCCESS IN OPERATIONS MEAN?

Contract Longevity is successful operations to any company. Retaining each contract and turning each contract into a profitable contract is key. I was fortunate in my career to work in a great company that did not understand the concept of losing a contract, they had a contract for 30 to 40 years and I was able to bring these best practices over to my successful cleaning company.

02

WHAT ARE KEY METRICS YOU MEASURE FOR SUCCESS?

There are 2 major ones: Stability of the Operations Management Team & Company Culture

- **Stability of Operations Management:** This experienced team is how you are able to win profitable contracts and execute a quality service. Having to replace this management team yearly or every 5 years doesn't allow a company to grow efficiently.
- **Company Culture:** Measuring the experience and attitude inside of organizations

What is your company culture?

Will your employees walk fire for you?

Do the Employees love the leader and the company?

- **Bonus:** Just because you know how to clean doesn't mean you can run a business. A healthy business has 3 legs: Marketing, Operations and Finance. It won't matter how well you clean, if you stay unbalanced.

03

HOW DOES WEAK OPERATIONS HURT A COMPANY THE MOST?

You fall into the bad cycle of unsustainable growth and account trading. Most companies don't realize that weak operations force them to win an account only to replace the account they just lost.

New accounts take more to service than existing accounts meaning it's costing you more to fall into this cycle than it is to just retain your current accounts.

04

WHAT DO YOU LOOK FOR WHEN BUILDING A POWERFUL OPERATIONS TEAM?

There are many qualities, but loyalty will be the most important. Give me 3 people that are loyal and we can go after any challenge and succeed. Loyalty comes from a gut feeling, I would take it over experience and education.

When you are setting your plan to take over the market, you are not able to accomplish the plan if there is no loyalty from your team. **Loyalty is Powerful.**

05

WHAT ARE SOME OF YOUR BEST PRACTICES FOR CLIENT SATISFACTION?

Go above and beyond for your clients! Anything they need for anything in the city, you call me first. Story: I even helped a property manager that was moving homes with her move to a new home. We hired movers to help her and make her life easier. The key is to go above and beyond and be there for your clients.

My rule is: Always solve problems outside of the scope of work

06

HOW DO YOU PRESENT TO LEADERSHIP WHEN IMPLEMENTING A NEW INITIATIVE?

- Research and understand the benefits of the new initiative.
- Get the Buy-in from key players
- Set a plan to Execute the New Initiative
- Decrease Resistance from workforce and help

Company: Sawchuk Consulting
Name: Mike Sawchuk
Role: CEO

01

WHAT DOES SUCCESS IN OPERATIONS MEAN?

With respect to cleaning operations:

- 1) To consistently provide the highest levels of clean, healthy, and safe at the lowest overall costs; and
- 2) To provide the highest levels of CX (Customer Experience) and EX (Employee Experience)

That means having a great cleaning operation as assessed/compared to best-in-class operations with respect to: Products, procedures, protocols, policies

02

WHAT ARE KEY METRICS YOU MEASURE FOR SUCCESS?

- 1) Integrated and comprehensive assessment of your specific/site operation as compared to best-in-class operations on 140+ Key considerations
- 2) Operational Results - the use of required quality and quantity of evidence-based data to verify and validate cleaning results, which means the proper use of ATP swabbing and or fluorescent imaging Measure, report, track, and act-on the data to coach, train, or adjust Products or procedures, etc. as the conditions or threat levels dictate
- 3) Employee surveys/ Customer Surveys
 Net Promoter Scores
 Level of satisfaction of engagement, empowerment, motivation, trust, etc.

03

HOW DOES WEAK OPERATIONS HURT A COMPANY THE MOST?

If unable to provide high levels of clean, healthy, and safe at the lowest cost, and high CX and EX it means that others will provide greater value which then limits the ability to grow profitable sales

If the work culture is not healthy, that will impact the ability to attract, hire, and retain **GOOD PEOPLE**, the people with the RIGHT attitudes, traits, DNA, and skills, which in turn will impact the quality and quantity of results, the overall costs, CX provided, and limit growth potential.

04

WHAT DO YOU LOOK FOR WHEN BUILDING A POWERFUL OPERATIONS TEAM?

Attitudes for Employees: Ability to learn, Desire to learn, A calling to serve, and Good and proactive communication skills. Reliable, dependable, and punctual. Alignment to the company's core values/guiding principles.

For supervisors and managers: Subject matter expertise, Good management skills, Good communication skills, Proactive, Takes ownership, Good people person

For leaders: Ability to build trust, Effective listening skills, Desire to constantly drive better/improve, Great communication skills.

05

WHAT ARE SOME OF YOUR BEST PRACTICES FOR CLIENT SATISFACTION?

- 1) Be sure to REALLY know the expectations of all Stakeholders
- 2) Be sure to then set realistic objectives by Stakeholder group - what will be done; and what will not be done and why
- 3) Communicate effectively and regularly as to cleaning results, improvements, etc. to demonstrate that you are delivering consistently high levels of clean, healthy, and safe at the lowest overall cost
- 4) Ensure your cleaning staff knows they are always "on stage" and need to always act and clean as they are "on stage".

06

HOW DO YOU PRESENT TO LEADERSHIP WHEN IMPLEMENTING A NEW INITIATIVE?

The greater the quality and quantity of the information, presented in a compelling way that best speaks to the leadership's objectives, will impact the success of gaining approval from leadership.

- **WHY** - What's in it for them, the company?
- **HOW** - Cost, ROI, Payback Period, Execution Plan, How will the KPIs be measured and reported
- **WHAT** - What product selected and why, what others were included in the review, how was the winner selected.