



# BUSINESS TRAITS THAT DRIVE GROWTH **IN A NEW ERA**

*By Thomas H. Douglas*

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Throughout the events of 2020 and 2021, many businesses found themselves in survival mode, simply hoping to come out the other side more or less intact. While it is impossible to forecast the absolute end of the economic disruption that started with the pandemic, I've seen a renewed outlook and revived energy in business leaders across the country. The *better normal* finally looks to be within reach.

There are still plenty of challenges that will have to be overcome, but having weathered adversities, it's time to put the lessons of the last year to use. **It's time to move beyond surviving and begin thriving.**

In consideration of all the changes we've seen in the business world, here are the top traits and leadership skills that are essential for every company and leader to thrive in this new era.



# PEOPLE FIRST:

START WITH WHAT MATTERS MOST

*Your people are the foundation for everything you do, so the best place to start is with the things that cultivate successful employees and a strong company culture.*

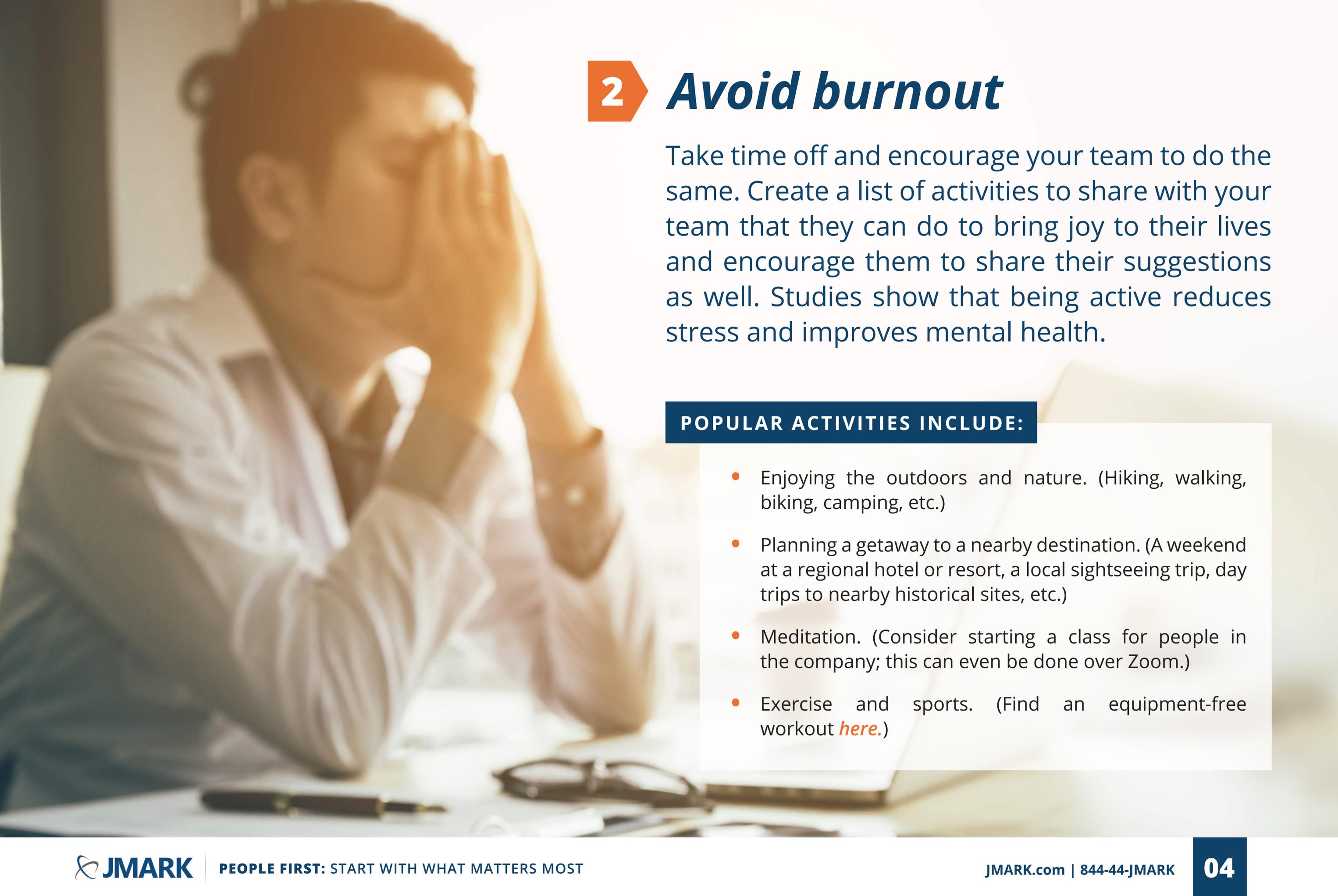
# ANXIETY MANAGEMENT

There are a lot of people dealing with a larger amount of stress than normal. As leaders, we have to help people know how to navigate through these times. Some of the most helpful things you can encourage your people to do include:

## **1** *Block out the negative noise*

Endorse turning off the news and setting aside social media.





## 2 **Avoid burnout**

Take time off and encourage your team to do the same. Create a list of activities to share with your team that they can do to bring joy to their lives and encourage them to share their suggestions as well. Studies show that being active reduces stress and improves mental health.

### POPULAR ACTIVITIES INCLUDE:

- Enjoying the outdoors and nature. (Hiking, walking, biking, camping, etc.)
- Planning a getaway to a nearby destination. (A weekend at a regional hotel or resort, a local sightseeing trip, day trips to nearby historical sites, etc.)
- Meditation. (Consider starting a class for people in the company; this can even be done over Zoom.)
- Exercise and sports. (Find an equipment-free workout [here.](#))



3

## *Focus on the next step toward the better normal*

Big goals are achieved in small increments, and maintaining attention on what needs to be done next can reduce feelings of being overwhelmed.

# BUILD YOUR CULTURE

Employee happiness goes beyond remediating anxiety. The next step is creating a culture where teamwork, passion, and inspiration can thrive. The happiest, most engaged employees are those who love where they work. Adopt tactics and technology that bring people together, even if your people are dispersed.



1

# Remote, in-person, and hybrid collaboration

Perhaps the most important factor in maintaining your company's culture—not to mention productivity—is employees being able to work together, no matter the size of the team that needs to collaborate.

## ACHIEVE THIS BY DOING THE FOLLOWING:

- **Embrace remote work as a part of your new business strategy.** Once things shift, they don't unshift. Working from home, full or part-time, is a part of the new normal. Make sure your business is ready.

- **Hold 1-on-1's via Zoom (or at a distance).** This ensures that team leaders remain connected to their people. A few best practices include:

## FIND THE RIGHT CADENCE.

- ▶ **Consistently recurring** – Everyone should know when their next 1-on-1 is so they have clarity on when they'll have a chance to discuss challenges.
- ▶ **Weekly or bi-weekly for direct reports** – The more leadership or collaboration required, the more often the meeting should occur. Individual schedule requirements may dictate the exact cadence.
- ▶ **Bi-weekly or monthly for collaborative teams** – When teams of multiple people work together, there should be sync-ups to ensure impediments are removed and to create trust. These meetings should occur on a schedule that ensures work can move forward unimpeded.



## DEVELOP A SIMPLE, FLEXIBLE AGENDA.

For example, take time for each of the following areas:

- ▶ **Segue** – A quick check-in on how the person is doing. This is a time to get the meeting started right by sharing some good news. One of my favorite personal beliefs is, "Appreciation is the currency for motivation." Share something that you appreciate that the person has done since the last meeting.
- ▶ **Personal development** – Check on what skills the person is focused on improving. This could relate to health, marriage, parenting, etc. What actions do they want to commit to taking before the next meeting?
- ▶ **Professional development** – What skills is the person focused on improving to create more value, improve their chances at increased responsibility, and possibly increase their income? What actions do you each want to commit to taking before the next meeting?
  - > **Performance rating alignment** – How does the person rate their performance since you last met? As a leader, do you agree? Discuss why or why not in a productive, motivational manner.
- ▶ **Operational challenges** – What impediments are making it challenging for the person to be successful in their responsibilities and job functions?
- ▶ **Suggestions** – If the person could change one thing, positive or negative, what would it be and why?
- ▶ **Action item tracking and timeframe commitments** – Have a system for recording responses and tracking action items. Currently, we are testing and finding success with *MeetingZen*.



- **Bring the company together regularly.** Ongoing company rallies to celebrate wins (for the company, teams, and individuals), share news, and socialize are vital to culture. If you are working in-office or hybrid, do this monthly. If your teams are dispersed, a shorter, weekly rally may be highly valuable.





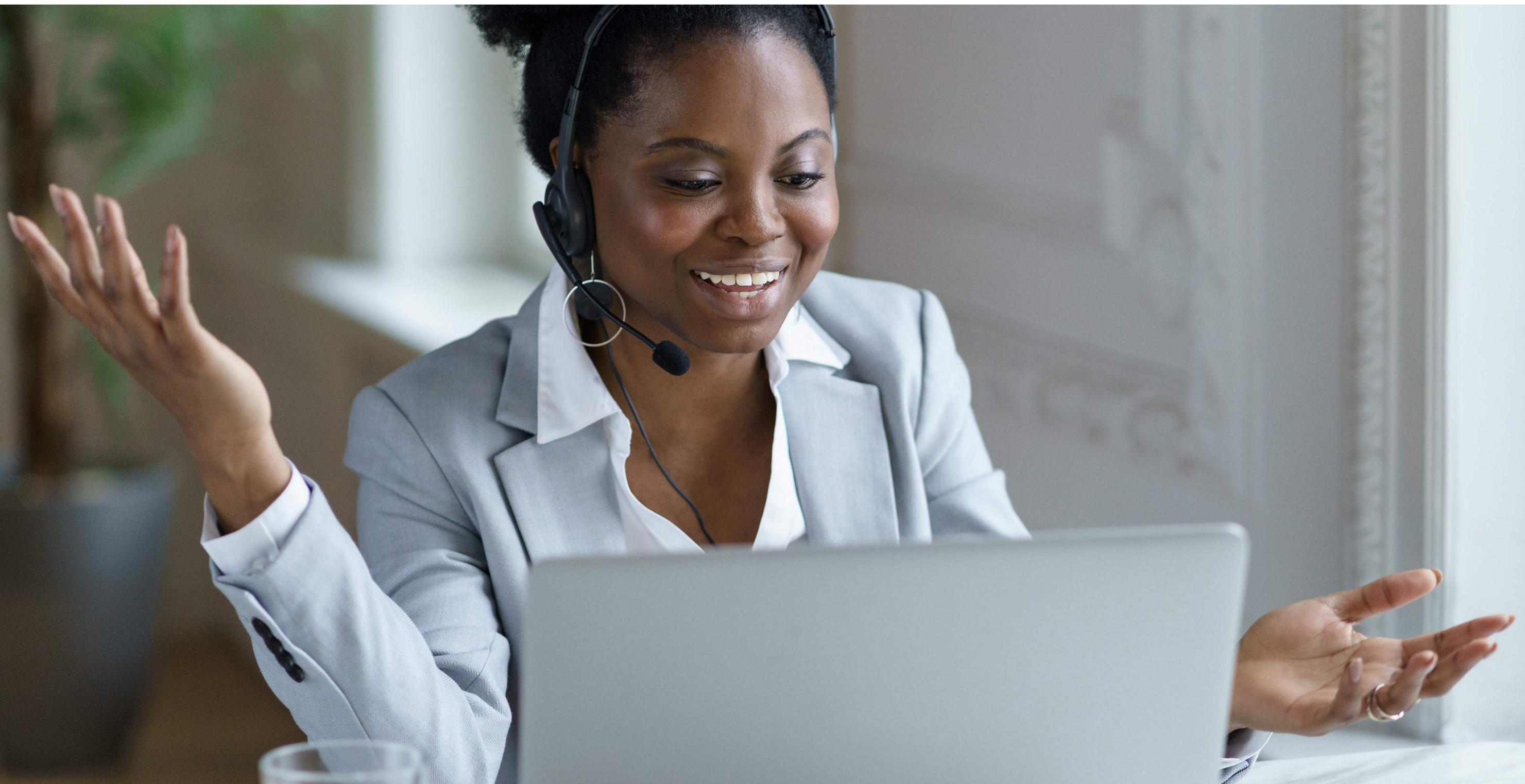
- Find a communication and collaboration platform that will help unify your culture.

**EMAIL SUCKS ENERGY AND SLOWS COLLABORATION AND CREATIVITY.**

**JMARK HAS FOCUSED ON WORKPLACE FROM FACEBOOK**

Set guidelines for who will respond and a time frame for how quickly they must do so. Ideally, this should be within an hour.

- **Teamwork is valuable and vital when everyone is at home and distracted.** With remote workers, it takes extra effort to make sure people feel appreciated and like they belong. Working with others on a regular basis creates strong bonds and collaborative ownership of projects.





- **Hold better meetings.**

### **INVEST IN TECHNOLOGY TO MAKE CONFERENCE ROOM MEETINGS STELLAR FOR ALL ATTENDEES**

Simply put, everyone in a meeting needs to be able to see and hear everyone else clearly. This requires a smart combination of audio, visual, and networking components. JMARK has developed a pre-packaged solution called Engage to make this technology readily available to smaller companies.

### **ESTABLISH RULES FOR FACE-TO-FACE MEETINGS**

In-person feels a little awkward these days, but establishing expectations up front so people know what to expect can help everyone feel more comfortable. Set limits on time and the number of attendees, replace handshakes with fist bumps, set clear rules for masks, etc.

# TECHNOLOGY SECOND:

EMBRACE THIS KEY DIFFERENTIATOR

*Every business is a technology business. But for the highest performers, technology is more than just a tool to get things done. When embraced and employed strategically, technology becomes the driving force behind an organization's success, a cornerstone of innovation, agility, and adaptability.*





# DRIVE EFFICIENCY

An effective, modern business cannot have bloat or excess. Use your technology to be lean and agile. Focus on the functions, actions, and investments that actually move the needle.

1

# *Leverage technology to speed up the sales cycle*

It's easier than ever to get the right information into the right hands at the right time.

- **Create a library of on-demand content.** Give potential customers clear, complete answers and information about your products so when the conversation with your sales team begins, it can focus on converting, not explaining.
- **Build a community.** Find the right list of people who relate and appreciate the value you create. Then provide more value. Become the go-to resource in your area of expertise.



- **Respond at the “speed of pain.”** Make sure people can get to you easily when they “need you now.”

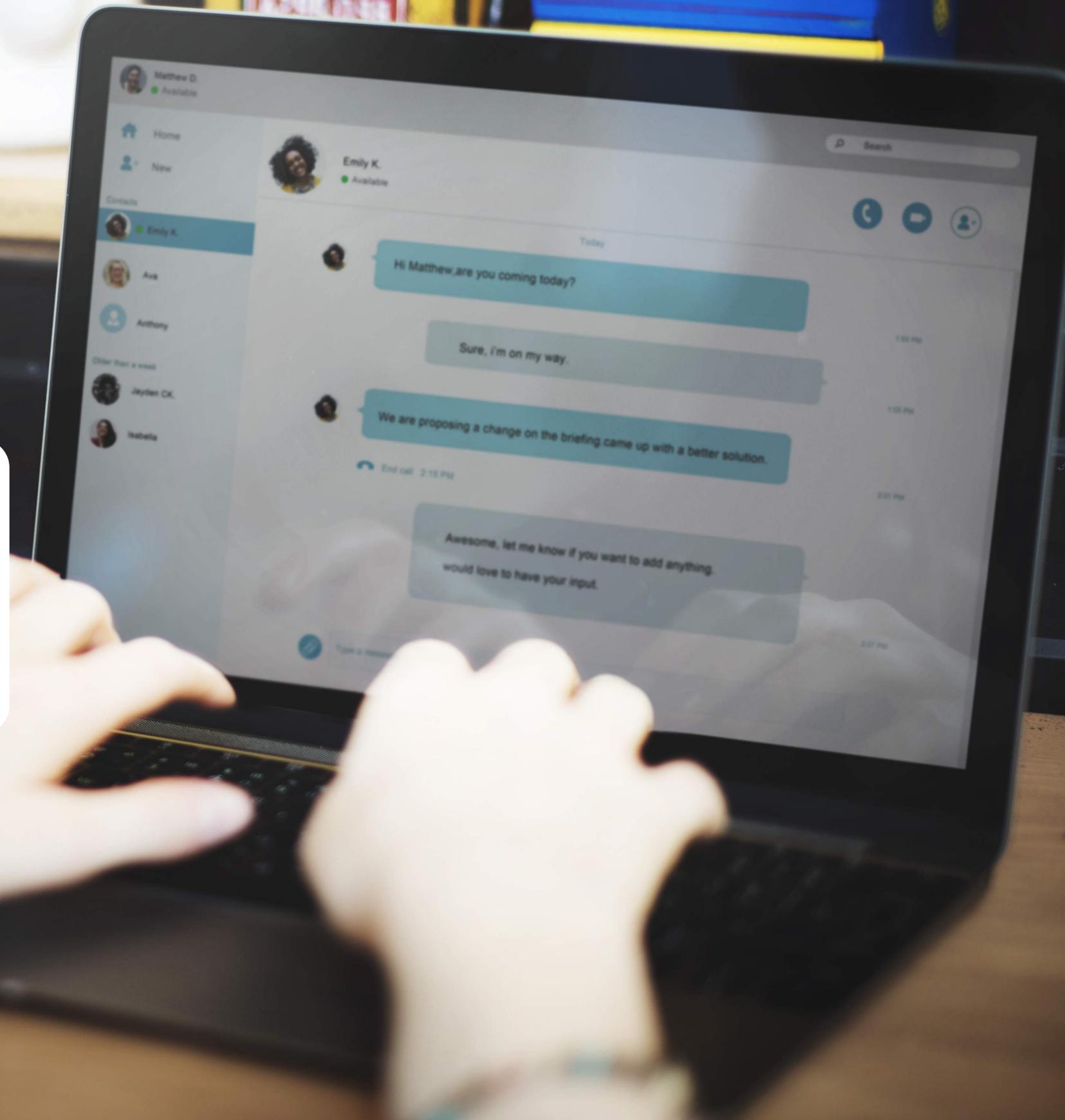
## ADD A CHAT OPTION TO YOUR WEBSITE HOMEPAGE

## MAKE SURE THE CONTACT US LINK ON YOUR WEBSITE IS EASY

Put the link where it is visible and give clear instructions on how to reach your team.

## FOLLOW UP WITHOUT DELAY

Set guidelines for who will respond and a time frame for how quickly they must do so. Ideally, this should be within an hour.



## 2 *Selling from afar*

Just because you may not be able to meet face-to-face does not mean your sales cadence and presentation need to suffer. Technology can overcome the distance.





- **Drown out all the other noise.** Your audience is less "captive" than when you're in a conference room together. So put in the work to keep their attention.

## SECRETS FOR SHOWING VALUE VIA WEB CONFERENCE INCLUDE:

- ▶ **Use Zoom** – It's easy to use, and everyone knows it now.
- ▶ **Identify challenges/opportunities** – Ask probing questions and listen carefully. Quantify the challenge/opportunity within a sharable format where people can see and engage with it. Show that you can solve their problems. The ultimate goal is to be of service.



## CONFERENCE ROOM-TO-CONFERENCE ROOM COMMUNICATION IS TRICKY, BUT YOU CAN CONTROL YOUR END.

So invest in technology to make your side shine. Show that communicating and connecting effectively matter to you. Once again, this is where a solution like JMARK's Engage package can help.

3

## *Digital proposals, engagement letters, and signatures*

Pick the paperless option that works for you and practice using it beforehand so there will be no hiccups on meeting day.

- **Adobe Sign** – Usability is good but not great. Less expensive than DocuSign.
- **DocuSign** – Usability is better, but a bit more expensive if multiple users need to utilize the platform.
- **HelloSign** – Less expensive, reduced working knowledge of customers. Usability is average.



# BUSINESS INSIGHTS

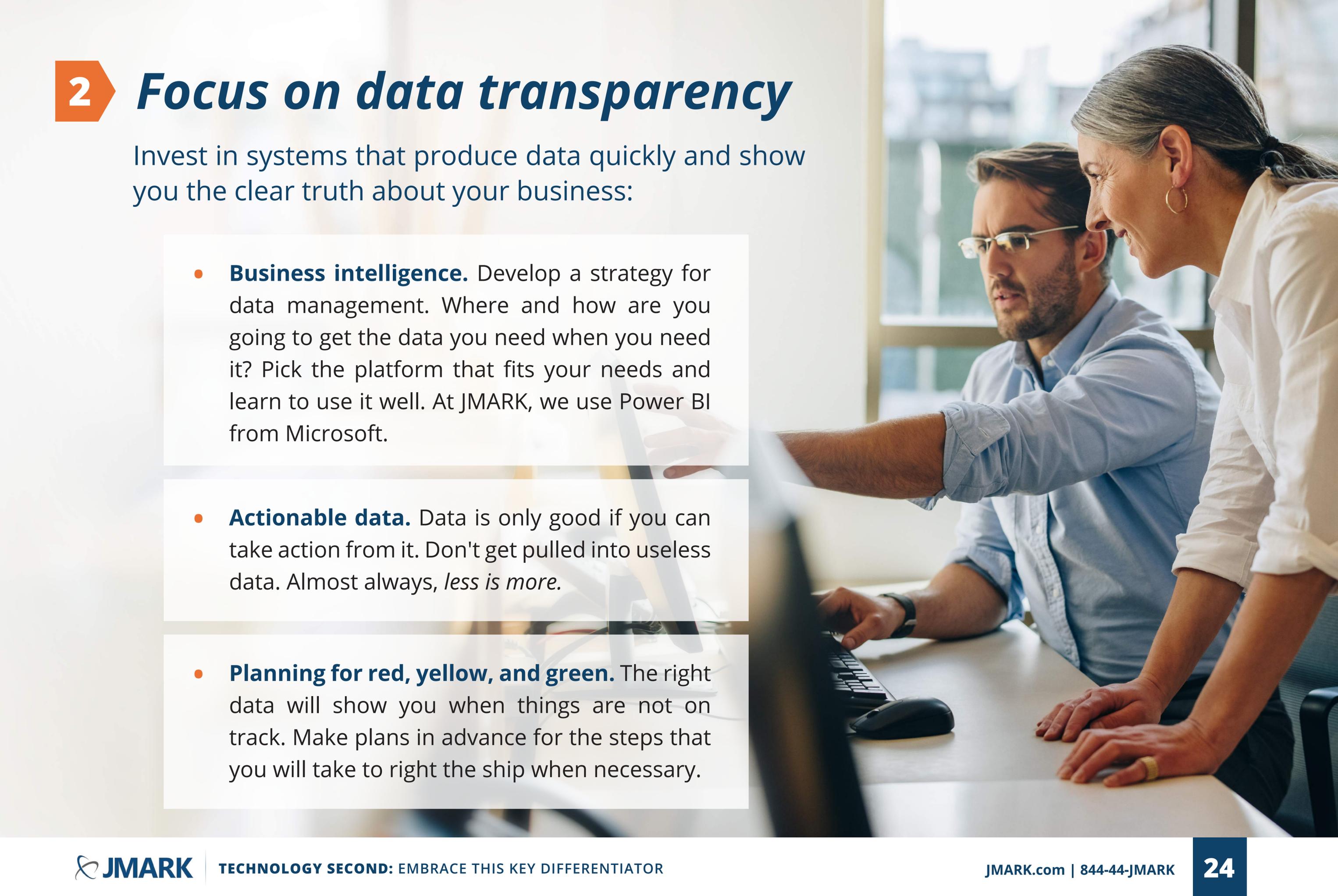
For good and bad, technology has made reams of data more accessible than ever. Make sure you know the numbers that matter.



1

## *Identify the KPI's that matter*

Take the time with your leadership teams to make sure you are measuring and tracking the things that have the most impact and give you the right knowledge.



2

## Focus on data transparency

Invest in systems that produce data quickly and show you the clear truth about your business:

- **Business intelligence.** Develop a strategy for data management. Where and how are you going to get the data you need when you need it? Pick the platform that fits your needs and learn to use it well. At JMARK, we use Power BI from Microsoft.
- **Actionable data.** Data is only good if you can take action from it. Don't get pulled into useless data. Almost always, *less is more*.
- **Planning for red, yellow, and green.** The right data will show you when things are not on track. Make plans in advance for the steps that you will take to right the ship when necessary.

# CREATE A STRONG SECURITY POSTURE

Cybercrime incidents have increased at a dramatic rate since the beginning of the COVID-19 pandemic. Remote and hybrid workforces bring unique challenges to security protocols. *Bottom line: It is time to double down on security.*



# 1 *Cybersecurity awareness*

It is not a matter of "if" you'll come under attack; it is when. *Will your people and systems be ready?*

**74%**  
*(UP 14% OVER 2019)*

Percent of phishing attacks that succeed

**\$3.86**  
*MILLION*

Average cost of a data breach

**69**  
*DAYS*

Average time it takes to contain a breach

## **DOWNTIME COSTS CALCULATOR**

Here is a tool to help you see the impact of downtime on your business.



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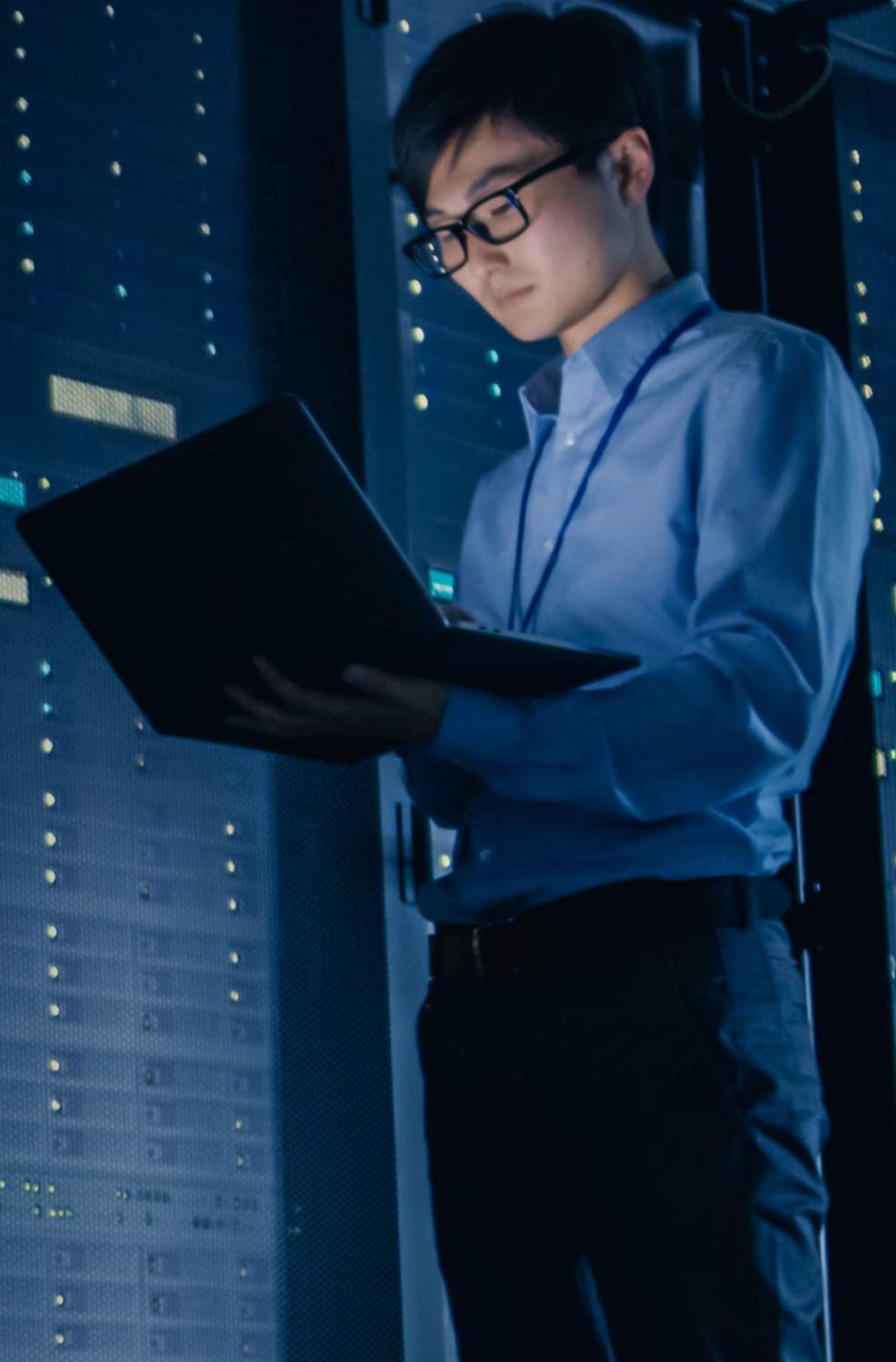
***It is everyone's responsibility to protect the business.***

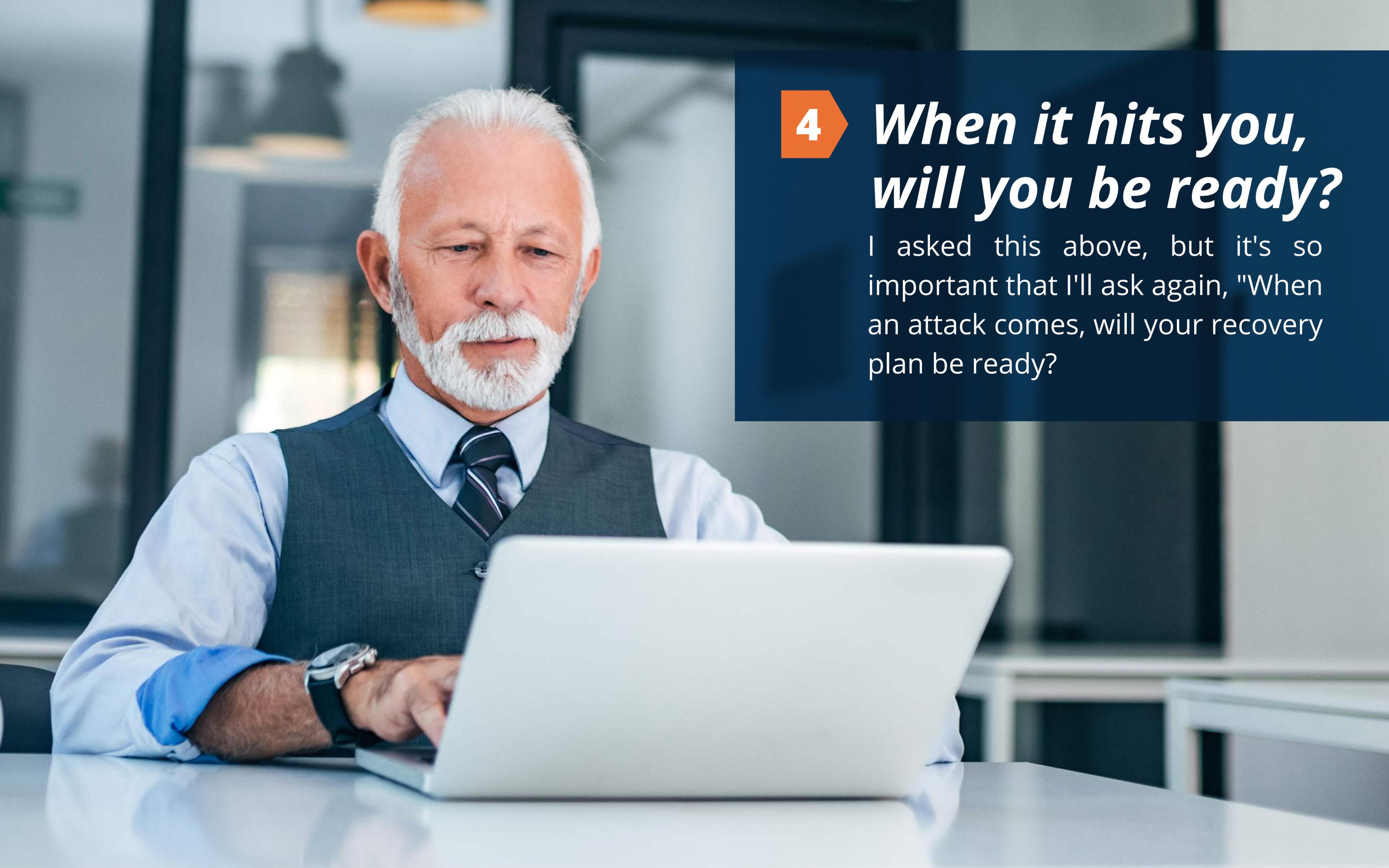
Train your employees to recognize and avoid social engineering attacks.

### 3 *Create a data safety and recoverability plan.*

Backing up data is only step one. It is critical to have a plan to store your data safely and quickly recover it should you need to.

- **Reliable onsite and offsite recovery solutions.** – Your data needs to be safely stored in two places. Back up your backup!
- **Immutable recovery solutions.** – Should one system be corrupted, this protects your data, blunts the impact, and ultimately gets you back to business more quickly.





4

## *When it hits you, will you be ready?*

I asked this above, but it's so important that I'll ask again, "When an attack comes, will your recovery plan be ready?"



# PERSONAL HABITS

FOR STRONGER OUTCOMES

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*Every visionary leader has the opportunity to set the tone for their company to work in a smart, disciplined, efficient manner that produces consistent results. Tap into these seven secrets to set yourself, and your business, up for big success.*

# DESIGN THE PERFECT WEEK.

Cadence management is one of the most important things that leads to repeatable outcomes as well as clarity. Ironically, however, this is something most organizations struggle with. That's why designing the perfect week is one of my favorite exercises—because in order to have the energy and focus you need, your schedule has to match your intention.



The key is for each individual leader to take the time to design the personal schedule that works best for the work they have to do that week. The best place to start is with a schedule that would be perfect if you were free to design it any way you wanted. This gives you the ideal foundation to work from to ensure you manage each day and get the most from your time investment.

**A**

Include your 1-on-1 meetings, leadership meetings, and client meetings, as well as check-ins and prep time in your plan.

**B**

Block out time for project work based on when you have the right level of energy to work on those projects. For example, if you like to work on big projects first thing in the morning, then make sure and designate the time.

**C**

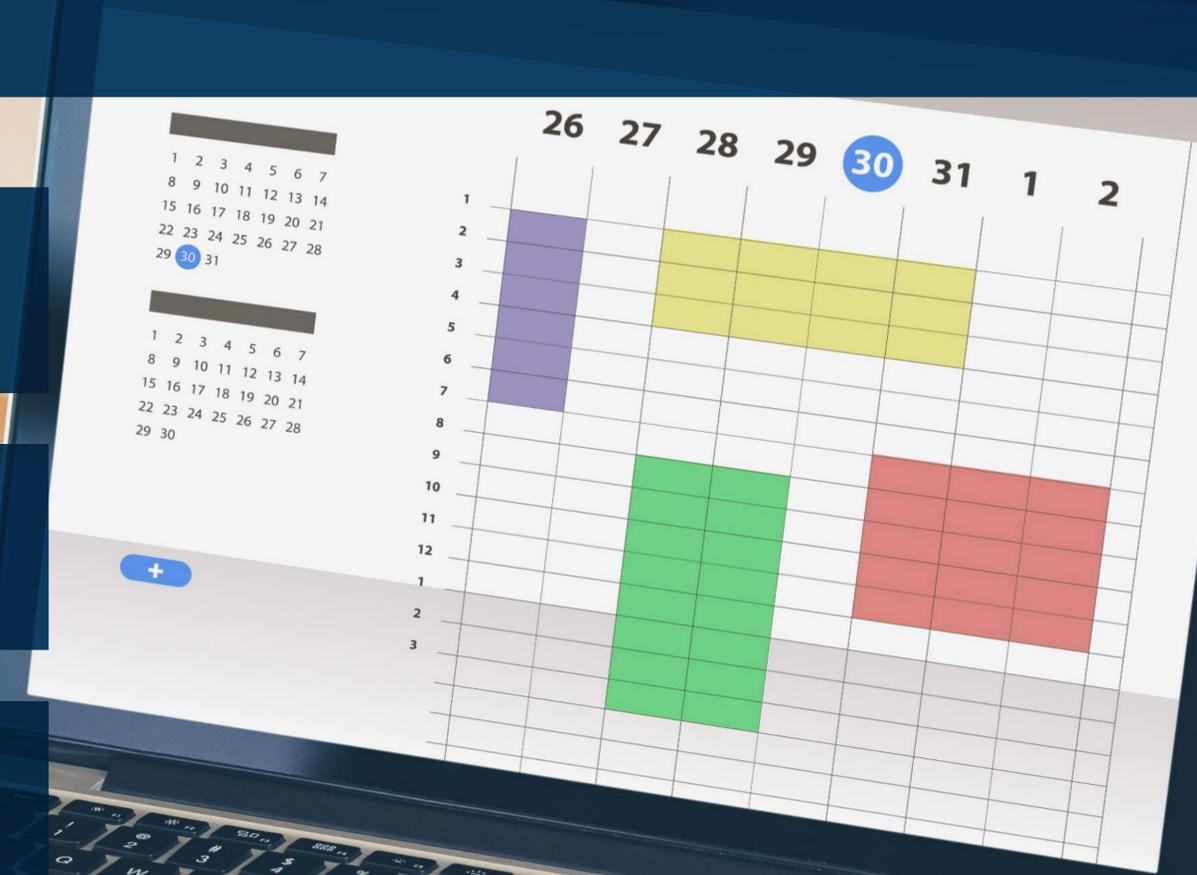
Depending on your role, include time for contacting customers and prospects to ensure you maintain the relationships that are important for the business.

**D**

Sync your calendar with everyone on your team, working with them through the exercise. This gets everyone on the same page regarding priorities and planning.

**E**

Here is a "*Perfect Week*" template document to give you a jumpstart.



# PRIORITIZE PROPERLY.

Find a to-do manager that works best for you. You can use paper, Outlook tasks, Todoist, or any of the multitude of other options out there. My personal preference is *Trello*.

- A** Use it each day to determine the "have-to-do's" and the "nice-to-do's." For the "have-to-do's," I focus on three personal priorities and three business priorities. Then the "nice-to-do's" come next.
- B** Schedule time in your day for the "have-to-do's."
- C** Each day you should have specific tasks or activities that focus on revenue generation of some type—things like calling prospects, creating content, cultivating existing customer opportunities, etc.





# USE DATA TO DETERMINE WHAT TO DO MORE OF AND WHAT TO STOP.

- A** Email marketing tools such as MailChimp, Constant Contact, Infusionsoft, *HubSpot*, etc., will tell you what your delivery and open rates are. Determine what types of messages resonate with your target audience.
- B** Use tools to evaluate the performance of your website. Sync up with a web professional and make sure you are getting the truth about your website traffic. Focus on actionable website user insights. How are people finding you? Are your social media posts helping? What keywords work best for you? Etc.
- C** Manage your social media and schedule posts when your audience is paying attention. There are several tools like Hootsuite, Buffer, or *Agorapulse* that you can use to schedule posts ahead of time. (Schedule some but not all; you don't want your social accounts to become too stiff and obviously programmed.) Then measure your engagement rates and tweak as necessary.
- D** Know your sales pipeline and use a tool that makes it easy to manage opportunities. You can use something as simple as Excel, or tools like Pipedrive, HubSpot, or Salesforce. Know what actions should be taken to move each opportunity on to the next phase of your pipeline.



**E** Know the financial numbers or KPI's (key performance indicators) that determine the health of your business:

- **Cash balances vs. minimum cash requirement**
- **Accounts receivable**
- **Accounts payable**
- **Revenue vs. goal**
- **Gross margins vs. goal**
- **SG&A (selling, general, and administrative expenses) vs. goal**
- **Work in progress and forecast for revenue vs. goal for the month or quarter**

# USE THE RIGHT TOOLS FOR THE JOB.

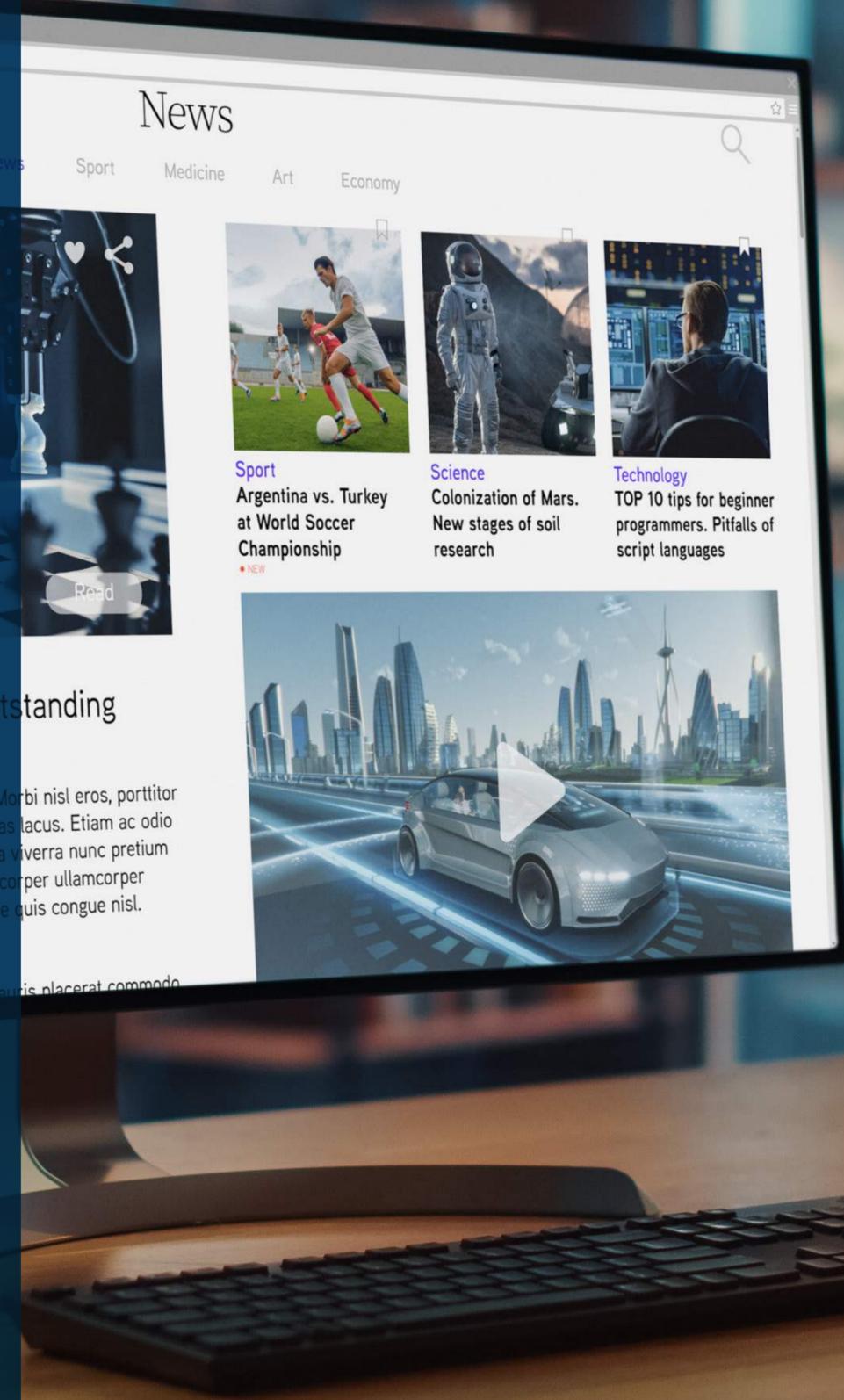
Some of our favorites are:

- A** *Office 365* with online sharing. Share and edit Word documents, Excel sheets, or PowerPoint files in real-time. With the right setup, *Microsoft Teams* can easily facilitate this, plus other collaborative work.
- B** For notes, we love *OneNote*, which is a free part of the Microsoft 365 suite if you don't subscribe. Even with limited use, it's a great product. Another good alternative is *Evernote*.
- C** I already mentioned it above, but we love *Trello* for to-do management, collaboration, and follow-up management. It also works very well for project management and organization styles such as Scrum, Kanban, and Agile.
- D** *Smartsheet* for project management as well as reporting and some dashboard management.
- E** *Workplace from Facebook* for culture management, team sharing, onboarding, and much more. *JMARK is one of a few select companies hand-picked by Facebook to be a Workplace Partner and help others implement this tool in their business.*
- F** *Zoom* for video collaboration and meetings. We have had a number of employees working remotely full-time for quite a few years, and Zoom has long been one of our most useful tools to make that work.

# STAY CURRENT ON WHAT YOU NEED TO KNOW AND GET RID OF THE OTHER NOISE.

In this era, there is more noise out there than ever before. You have to focus so you don't become distracted. Make conscious choices in order to avoid being pulled too easily in unproductive directions.

- A** Identify the newsletters, blogs, and content that is important to you. I enjoy *Morning Brew*, *Entrepreneur*, *ZDNet*, and *The Wall Street Journal*. For local news, I recommend local business news sources such as *Biz 417*, *Springfield Business Journal*, and *Tulsa World*.
- B** For those emails that create more noise than value, use Outlook rules to move messages to your Deleted Items box or unsubscribe (if the sites are reputable). You can also use spam management tools like Barracuda to help.





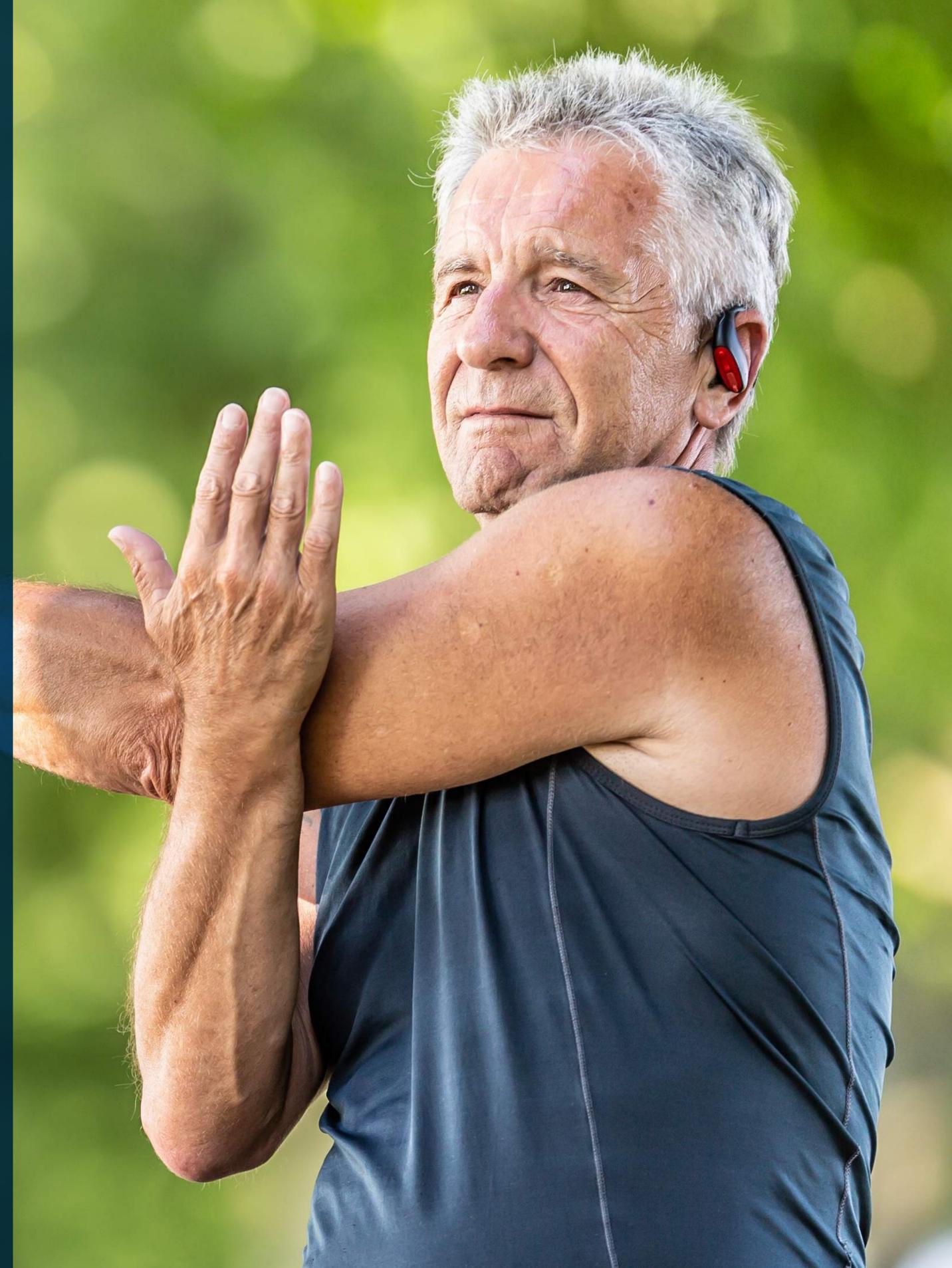
# GET COMFORTABLE WITH CREATING CONTENT, ESPECIALLY VIDEO.

There is something nerve-racking about producing video (at least for me). However, in today's world, it's an essential part of marketing your business on your website, blogs, social media, and more. Plan some time to put together good content. If you need help, there are lots of resources available locally and on sites like *Upwork*, *Fiverr*, and *99designs* that can help with all types of website needs, content creation, and editing.

# STAY ENERGIZED.

While the world is not what we'd love it to be at all times, we have to focus on the opportunities we have. I believe everything starts with gratitude and appreciation.

- A** Focus on your health and staying in shape. If you don't have energy, neither will your team.
- B** Take the time to show your appreciation. One of my favorite personal beliefs is, "Appreciation is the currency for motivation." Make sure you share your appreciation for your team.
- C** Working yourself to exhaustion will not solve the problem. Get rest, take time off, recharge, and be the leader you need to be.





I believe your business will thrive once you have the right foundation of people and technology in place, and you utilize these principles to increase focus and efficiency—even in a business environment clouded with economic and social uncertainty. In fact, history has proven that many of the most successful companies in the world, from Amazon to Apple, actually grew during economic strife and throughout the recovery period that followed.

After you put these ideas into practice, let me know how it goes. I'd like to hear your story.

**Thomas H. Douglas**

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