



BOSS

BUSINESS **O**PERATING & **S**TRATEGY **S**YSTEM

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GET CONTROL OF YOUR BUSINESS WITH BOSS

Are you struggling to manage or grow your firm?

Have you seen a plateau in productivity, efficiency and results?

You're not alone.

This is a common occurrence in business, and although there are no silver bullet solutions, there is no need to despair. It takes a comprehensive approach to overcome the obstacles keeping you from the results and experience you are looking for.

That's where BOSS, the Business Operating and Strategy System, comes in. The following will provide a high-level overview of what BOSS is, how it is implemented, and the benefits it delivers.



Stu Haney

Business Management Consultant

Stu Haney has over 35 years of experience in the professional services industry. His journey has taken him from Engineer to CEO of a \$100 Million dollar national design and construction company. During that time, he received extensive leadership training while participating in and managing nearly every aspect of the business. A coach by nature, what's most rewarding for Stu is helping others achieve their vision.



WHAT IS BOSS?

To put it simply, **BOSS** is a comprehensive system that puts strategy at the center of your operation. Everyone has an operating system, or a way they do business.

Most companies' systems are incomplete, inconsistent, undocumented and inefficient. This might suffice for an extremely small operation, but as your firm grows, the holes created by this lack of structure create real problems.

BOSS surrounds your strategy with six key operational functions:

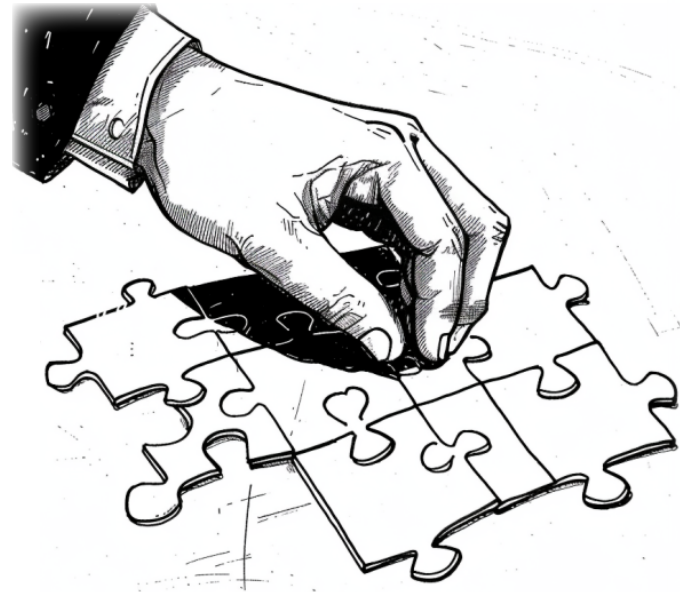
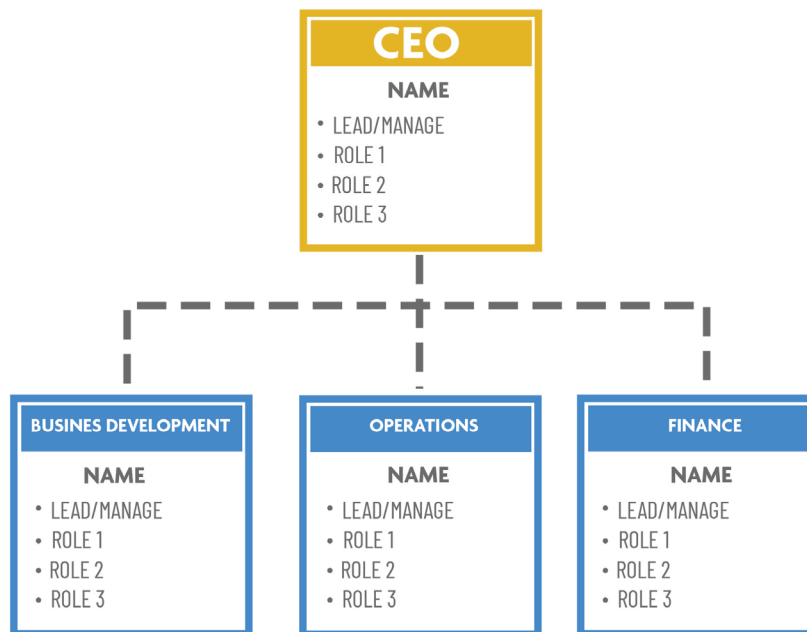
People - Process - Cadence - Metrics - Issues - Finance



PEOPLE

PEOPLE are the fulcrum of any business, and this is especially true in the realm of professional services.

This function is all about getting the right people in the right roles, complete with role identity and accountability.

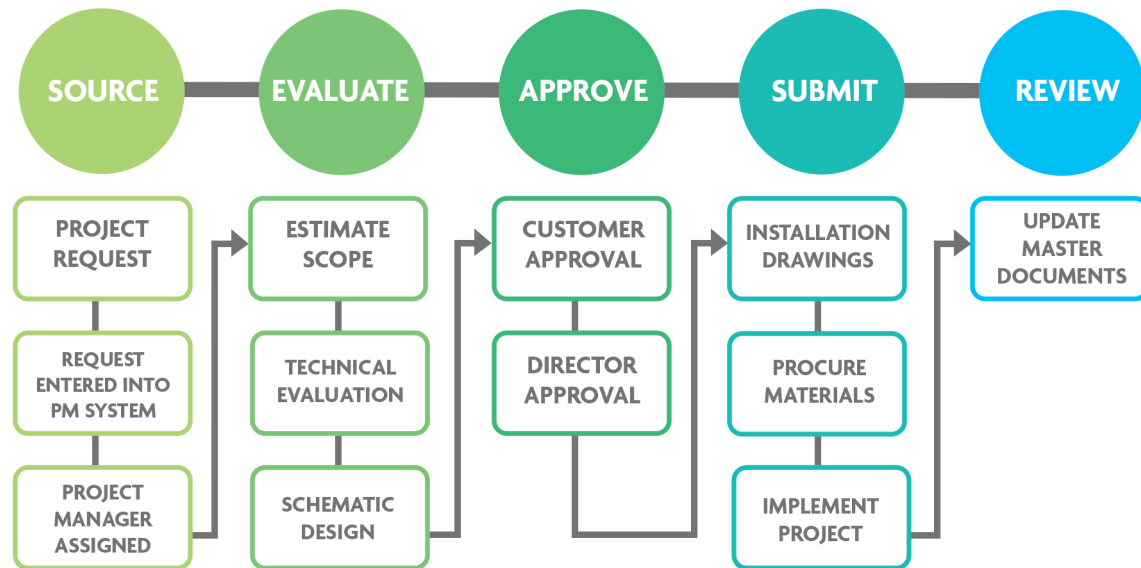


With **BOSS**, we achieve this using a few different tools including an enhanced organizational chart that establishes clear role expectations along with a “fit analyzer” tool that facilitates evaluation and coaching.

NOTHING is more powerful than the right person in the right seat.



PROCESS



MANY firms resist documenting their core processes, and this is a common reason they stagnate. It is a limiting belief that documenting your key processes somehow restricts professional creativity.

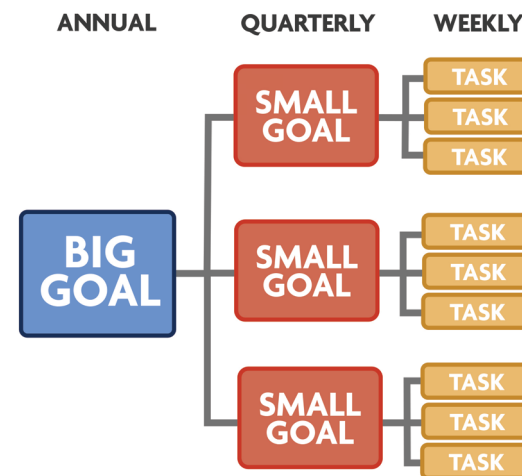
With **BOSS**, you document key processes, and they are shared with everyone. Over time, these processes are continually refined and improved through lessons learned.

CADENCE

SUCCESSFUL teams establish a rhythm. This is true in many endeavors, from things like music and sports, to, you guessed it, business. In business, meetings set the cadence. Having regular, effective meetings is critical to operational success. BOSS provides proven meeting tools to ensure that they promote cadence instead of hindering it.



CADENCE also affects a company's strategic goals. Broader, long-term goals don't fall within the natural cadence of a typical business week, and this is why those goals often fall through the cracks in favor of more immediate concerns. With BOSS, long-term goals are broken down into quarterly goals and weekly "to-do's", integrating them into your weekly cadence to stay top of mind and on track.



METRICS

DATA gets a lot of attention in business. Key performance Indicators and dashboards are the eye candy of every Enterprise Resource Planning (ERP) system.

Charts [config]

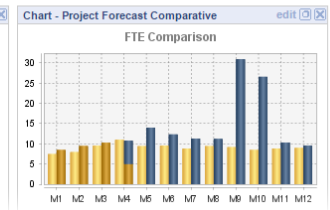
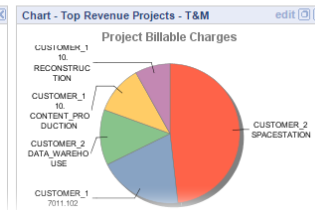
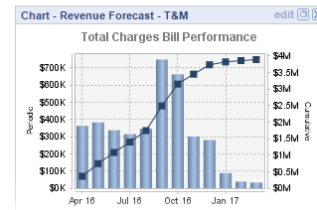
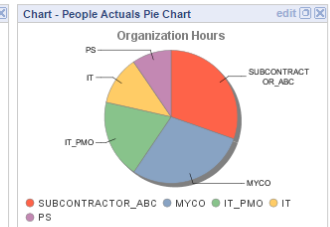
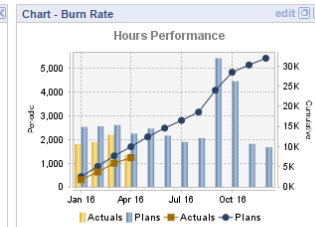
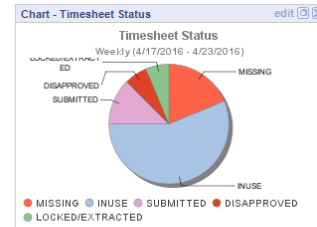
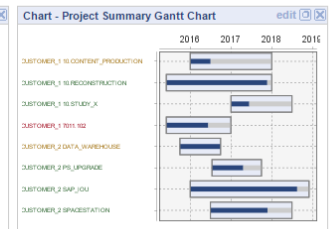
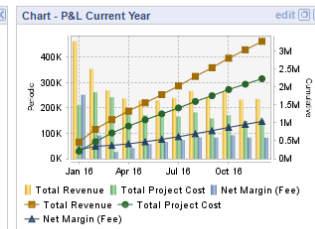
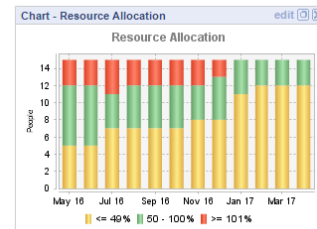


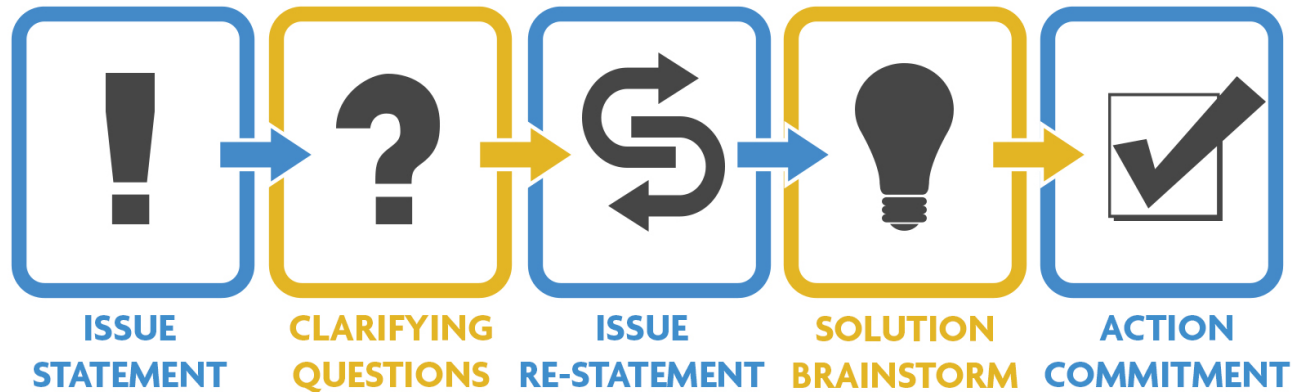
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THE hardest part of interpreting data is navigating the ocean of metrics for what matters to *your* operation. What makes BOSS metrics so effective is how they filter out the extraneous data to identify the few vital predictive metrics that keep a business on track and identify key areas for targeted growth. Metrics are tracked on a weekly, monthly, quarterly, and annual cadence.

ISSUES

EVERY business has issues. Most firms, upon identifying one, proceed to discuss it endlessly while failing to ultimately resolve the issue. These discussions spawn unproductive meetings, or worse, co-opt unrelated meetings where productive work could be done! The best firms not only know what their issues are, but how and when to effectively deal with them.

BOSS provides a structured approach to dealing with issues. It starts with prioritizing the most important issues and focusing on resolution before moving down the list. All issues go through a process of clarification, root cause analysis, and solution setting.



FINANCE

A Professional Services business is still a business, and running any business without a solid financial strategy is unsustainable. BOSS financial tools for Professional Service firms address two key areas of Finance.



FIRST is pricing strategy. The pricing strategy must be adequate to support the firm's operations and generate enough margin beyond that to invest in the firm and reward key contributors and owners.

SECOND is implementing an operating budget that is monitored regularly. Good budget discipline facilitates course corrections and ensures the realization of the results set in the pricing strategy.

STRATEGY

The **BOSS** operating system revolves around strategy. utilizing its own unique strategic planning elements. However, there are myriad ways to develop your strategic plan, and most if not all of them can be used with BOSS:

Mission • Vision • Values • SWOT • Marketing Strategies

(including three-year and one-year targets)

BOSS is adaptable and scalable, with its own streamlined, agile strategy development approach ideal for smaller firms that may not require the full production that many strategy planning system



IMPLEMENTATION

IMPLEMENTING BOSS follows a straightforward process. Everything starts with an Introductory Meeting. This is a discovery meeting without obligation wherein the BOSS implementer provides a quick background and learns about the company.

Following the Introductory Meeting, Implementation is achieved in two or three day-long meetings depending on the size and complexity of the company.

THE FIRST two days are devoted to developing the strategic elements of BOSS, tailored specifically to that firm. The outcomes of these meetings are allowed to percolate for 30 days. The next step is “Operations Day.” This session puts the operating tools of BOSS in place. At the end of these sessions, the firm is officially operating BOSS.

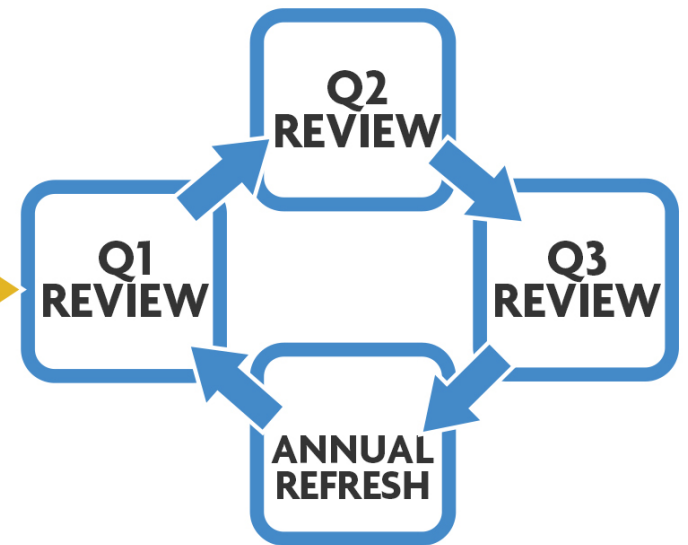
After implementation, the system calls for quarterly progress meetings and an annual refresh of the strategy and plans. The diagram below illustrates these steps.

PHASE 1: IMPLEMENTATION



- Vision
- Mission
- Values
- 3 year Target
- 1 year Goals
- Marketing Strategy

- People
- Process
- Cadence
- Metrics
- Issues
- Finance



PHASE 2: OPERATION



IT ALL STARTS WITH A CONVERSATION

MANY business leaders are engaged in an extended game of “whack a mole” where they address symptom after symptom as they occur. After a while it begins to feel like ground hog day. BOSS can break the cycle. With a comprehensive strategy and operating system, you will make real progress towards your vision and goals. You will stop chasing symptoms and start addressing root causes and you will operate with a stress reducing clarity you didn’t think was possible!

Are you ready for the next step? Schedule an intro meeting [HERE](#)

No matter what challenges you are facing in your company today, my advice is do this first.

