

Compliments of Paul Sanders

ISSUE 01 **BUSINESS** IN **ACTION**

**REVERSE ENGINEER
YOUR GOALS**

PG. 12

→ **DAVID MELTZER**
Wants to Change the World

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**MANAGING
REMOTE
EMPLOYEES**

PG. 38



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Front of Tear Out Card 1

**Get the Lowdown
on Home Offices**



Here's how to best
utilize your home for
more office space.



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Back of Tear Out Card 1

Tip 1


- Determine whether a space would make a likely home office.
- Want to retain the room's current use while adding functionality?
- Think vintage with a rolltop desk or armoire desk for an elegant workspace that can be hidden away when not in use.

Tip 2

- We all have dead spaces—an area under the stairs, a small nook, a stair landing, a bench seat under a window. Add shelving and a work surface to create plenty of room for your supplies, or consider a foldaway desk design if you want to keep things neatly out of sight.

Tip 3

- Renovate! It may take just a few days and a little ingenuity to convert an underutilized existing space into a private and functional office.
- If you'll be working from home in the long-term, you can realize solid ROI through increased productivity and concentration.





Dear Bill and Judy,

Where do you stand on your goals for the year? If the answer is “Anything but crushing them,” now is not the time to let up on the gas. There is often so much momentum at the beginning of the year to push yourself ahead, but by the time quarter two hits, you might be feeling some strain. This inaugural issue of Business in Action magazine is here to rejuvenate your mindset and help reset your motivation.

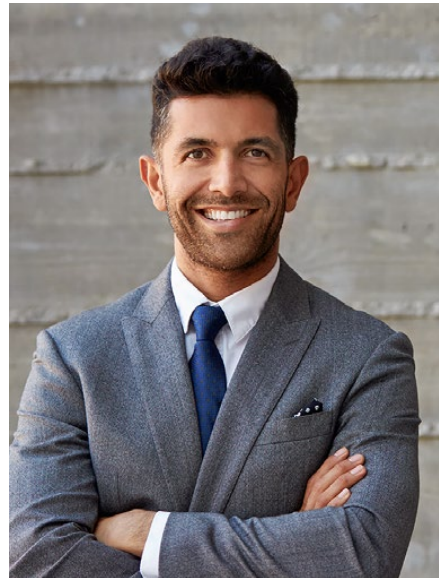
Every business has a revenue goal, but if you aren’t applying a step-by-step approach to hitting that goal, you’re probably not getting the results you want. This issue includes tips on reverse engineering your sales goals and growth-hacking basics so you can simplify your strategy and set measurable milestones for your progress.

Entrepreneurial business owners David Meltzer and Peter Taunton know all about growing an organization to scale. Both men share their journeys to success, including the tough lessons they’ve learned and the mindset and values that propelled their businesses to megasuccess.

The ingenuity it takes to lead a company has changed more over the past few years than at any other time in modern history. Managing a team of employees is a challenge in and of itself, but managing people remotely is a totally different ball game. Inside you’ll find a guide to help you implement policies and procedures that can boost your bottom line and the culture of your organization.

Be sure to consider the invaluable insights in this issue, and take action on what moves you and speaks to your company vision.

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Top Productivity Hacks for Your Business

To boost your productivity, you need to start by changing your mindset. BY RACHEL STEVENS


THESE THREE APPROACHES

to productivity will allow you to drive your day rather than let your day drive you. Try each method once, and then stick with the one that fits you and your business best.

Kaizen (The 1 Percent Method)

This method is inspired by a Japanese appreciation for continuous, incremental change. Choose an important long-term task, and dedicate yourself to getting 1 percent better at it every day. For example, improve your pitching skills by presenting an idea to a colleague for one minute every day and then asking for feedback.

The Churchill Method

Winston Churchill constantly struggled with competing priorities while governing war-torn England. If you have an overwhelming number of priorities, try what Churchill did: focus on two to three of your biggest priorities per day. One should be

an urgent task, one should be a profitable or beneficial task, and one should be a task that gets you closer to your long-term goals. For example, prepping for a meeting in the afternoon, closing a deal with a prospective client, and spending time on planning your marketing approach for the next few months.

The Eisenhower Matrix

Five-star general and US president Dwight Eisenhower used his love

of logic and math to make a simple decision-making tool to prioritize his presidential duties. His method is no national secret, and you can replicate his matrix. Draw an x-y grid with four quadrants. Label the x-axis (left and right) not urgent and urgent, and label the y-axis (bottom and top) not important and important. Place your tasks in each quadrant accordingly.

- **Quadrant I**
(upper left, important but not urgent):
Decide when it needs to be done, and schedule it for a less busy time.
- **Quadrant II**
(upper right, important and urgent):
Do it now.
- **Quadrant III**
(lower left, not urgent and not important):
Delete it.
- **Quadrant IV**
(lower right, not important but urgent):
Delegate it to someone else.



The 5 Characteristics of a Good Referral Source

Identifying your best referral sources could provide a wealth of untapped potential to serve new clients.

BY NATHAN SMITH

THE WORD OF MOUTH MARKETING ASSOCIATION

estimates that there are 2.4 billion brand-related conversations every day in the United States. If you want your business to be part of the discussion, it might be time to tap into your best referral sources.

Referral sources are invaluable to your business—they're just like having an unpaid salesperson. They can help connect you with potential customers you might not have reached on your own. However, you need to focus on the right referral sources. Through his company, Model FA, Dan Allison is helping businesses generate greater referral activity by identifying and prioritizing the following characteristics in referral sources.



1 THEY VALUE YOUR COMPANY AND ARE WILLING TO TAKE A RISK WITH A REFERRAL.

Your biggest fans will be some of your best referral sources. "The first characteristic is that you've got to have a client who sees so much value in their own experience with you that they would confidently take the risk and recommend you to somebody who's incredibly important," Allison says. While these clients may share the same enthusiasm for your business, it is important to remember that value and risk will mean something different to each one. "If you're the kind of client I want to work with, I should invest time into getting your honest feedback about what is exceeding your expectations, how you define value, and what we can do to improve," Allison suggests.



2 THEY UNDERSTAND YOUR BUSINESS AND CAN CONVEY ITS VALUE PROPOSITION.

It may take more than being a raving fan to be a strong referral source. They need the ability to articulate your company's value proposition and explain what sets your company apart from similar businesses. You will need to continually reeducate clients to remind them of the services you offer. "When I interview clients and I ask them to give me a comprehensive list of all the services that are available through the company, the average client can only list about 20 percent of the services that the business owner would list," Allison says. He suggests there are two concerns with that. First, if a client needs any of the other services you offer that they don't know about, they may work with your competition. Second, it could limit the number of referrals you could have.



3 THEY UNDERSTAND WHO YOUR IDEAL CLIENT IS.

If you expect a client to be an effective advocate and referral source for your business, you need to educate them about what an ideal client looks like. During company interviews, Allison asks clients if they went into a room full of people, got to know them, and then had to select an ideal referral for the professional, what characteristics they would look for. "I rarely have a client who is able to articulate those characteristics," Allison says. "So we're hoping these people are hunting for us, but we haven't given them the right equipment, and they don't even know what they're hunting for." You shouldn't expect clients to know what you need. Instead, you should educate them on the key demographics that you can help. Remember that if you don't equip referral sources with the best information, they'll be unable to make the right referral.



21 THEY UNDERSTAND A PERSONAL INTRODUCTION IS NEEDED TO MAKE A REFERRAL OCCUR.

A passive interaction where a client shares your contact information may not go anywhere unless there is a level of urgency. People unfamiliar with your business don't have that level of trust yet. "The majority of times it's a client trying to make a referral, but they're doing it in a way that does not lead to the outcome of the person they care about getting the help they need," Allison says. This is another instance where education is vital, and you must equip referral sources with the right information to make a referral effectively if the opportunity arises. Discuss with your referral sources a method of introduction they are comfortable with and the information they will need to make a connection. "Referrals are not an uncomfortable conversation," Allison continues. "They're truly a conversation about being helpful to people you may care about, and, if you frame every conversation that way, there is no salesmanship involved in it."



THEY ARE COMFORTABLE PROVIDING REFERRALS.

It's essential to identify who among your most important clients is willing to take a leap and make a referral. Allison refers to some clients as "gold mines" who will be happy to make a referral. However, others are "land mines" and will never make a referral. A simple way to learn which category clients fall into is to ask during an interaction. "I simply ask every client we work with 'How do we approach that topic in a way that will be comfortable for you but may lead to other people getting help?'" Allison recalls from his own experiences. If they are comfortable with it, you may have found a referral source. However, if they are uncomfortable, make a note of it and don't bring it up again to avoid harming that relationship.





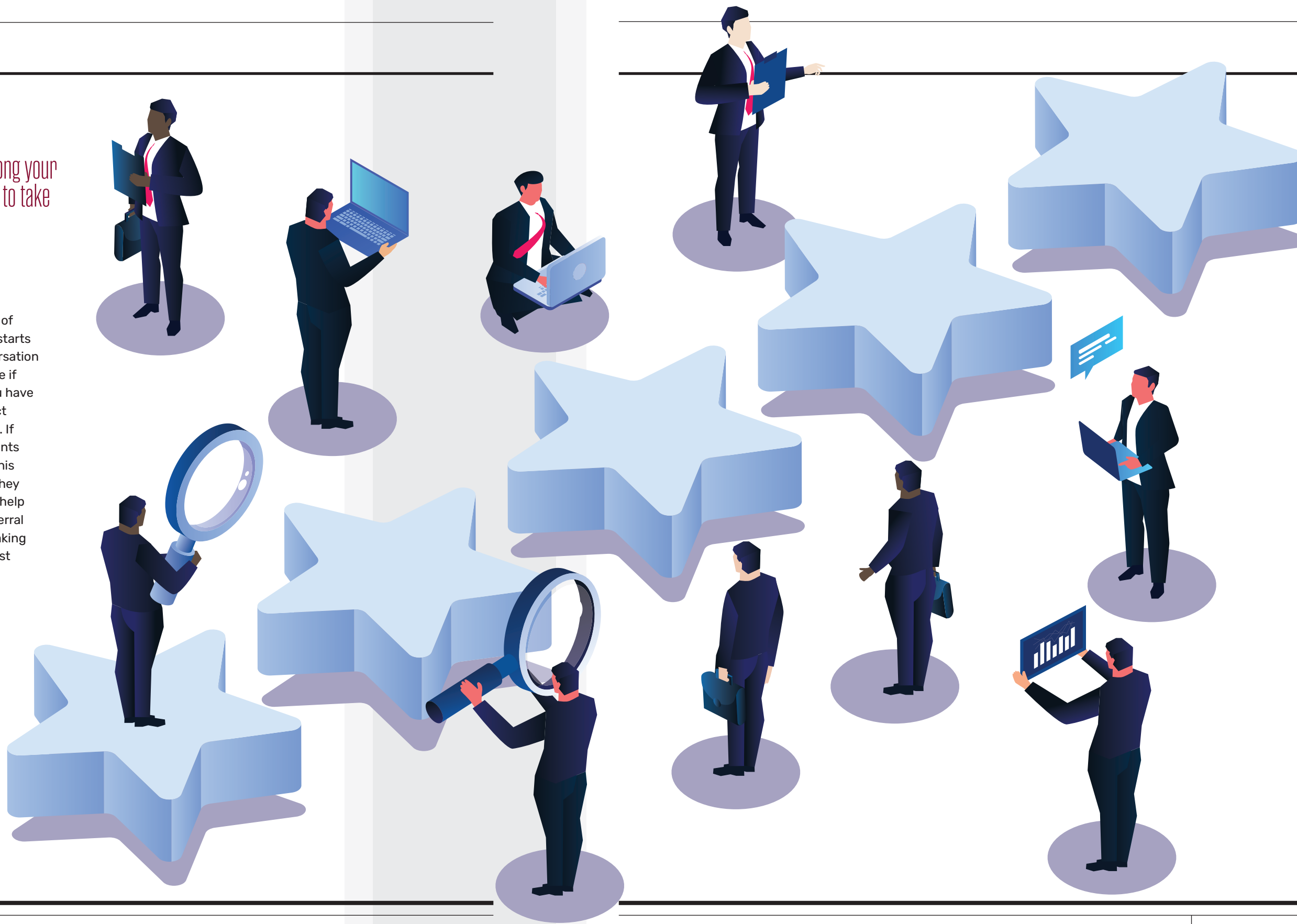
It's essential to identify who among your most important clients is willing to take a leap and make a referral.

Connecting with referral sources

While a referral source will provide you with potential customers, the process of recognizing each of these individuals starts with you. Schedule an in-depth conversation with your most important clients to see if they can help generate referrals. If you have an extensive database of clients, select only the ideal clients for your business. If your database is small, choose the clients who generate most of your revenue. This interaction will not only tell you what they like about your company but also may help build stronger brand loyalty in that referral source. "In my opinion, the value of making an existing customer feel important just can't be measured," Allison says. ■

Take Action

Set up meetings with clients who fit the profile of your ideal client type—the type you'd love to have more of—and get their honest feedback.



Reverse Engineer Your Sales Goals

Focus on small daily actions to drive big results for your revenue goals.

BY ALEXA BRICKER





ARE YOU WORKING HARD OR HARDLY WORKING?

It's an age-old question that can be surprisingly tough to answer, especially for entrepreneurs and small business owners. You might have days when you feel like you've been working from sunup to sundown with little to show for it.

You're doing yourself no favors by setting lofty goals without understanding the daily actions you need to take to make them happen. That's where reverse engineering your goals comes in: crunching the numbers that will ultimately drive your success.

Small actions = big results.

At its core, reverse engineering is all about the tiniest actions you do every day to achieve your goal. Maybe you want to do \$1 million in sales this year, hire thirty-five new employees, or launch a new product. Whatever it is, write it down, and commit to it.

Once you have your goal, determine the conversion points you need to track to achieve it. You'll need to ask yourself the following:



At its core, reverse engineering is all about the tiniest actions you do every day to achieve your goal.

- What is my average revenue per sale?
- How many sales will I need to hit my yearly revenue goal?
- How many leads will I need to hit my sales goal?
- What is my average win percentage? (conversion rate from lead to sale)

Do the math.

You don't have to be a master of calculus to understand reverse engineering. There is a simple equation you can follow to make the conversion points above a lot more measurable.

$$\frac{(\text{Revenue/sale} \div \text{Revenue goal})}{\text{Win percentage}} = \text{\# of Leads needed}$$

*Average revenue per sale ÷ revenue goal = Sales goal

*Sales goal ÷ win percentage (conversion rate from lead to sale) = Leads goal



Establish a revenue goal for your business. Plug your numbers into this equation, and set three trackable KPIs you can use to help you achieve your goal.

DAVID MELTZER

WANTS TO CHANGE THE WORLD

The cofounder and CEO of **SPORTS 1 MARKETING** intends to improve the lives of a billion people, and he knows how he'll do it.

BY **MATTHEW BRADY**





DAVID MELTZER HAS A MISSION.

As is the case with any entrepreneurial vision, it's bold, carefully thought out, and loaded with business savvy—but its foundation is built firmly on his own life lessons.

The seeds for this journey were planted when Meltzer was only five years old, after his father left his family. "I grew up poor, one of six kids living in a two-bedroom apartment in Akron, Ohio," he shares, "But it was one of the most valuable lessons of my life. Because the only time I wasn't happy was when I'd catch my mom crying, worried to death about how she would afford food or clothes for us. I decided then that I would be rich so I could buy her a house and a car. Then I'd be happy all the time."

Following their mother's mantra of "doctor, lawyer, or failure," every Meltzer child managed to secure an Ivy League education—other than David, who earned a football scholarship to Occidental College in the hope of playing professionally. However, he quickly realized his future wasn't as





an athlete or a doctor (“I actually thought I could be a sports doctor without having to be in a hospital, because I hate hospitals,” he deadpans), so he set his sights on becoming a lawyer.

Showing his early penchant for making money, Meltzer researched law schools based on which would lead to the highest-paying job, which were oil-and-gas litigators, and promptly chose the top school for that area of law, Tulane University. Upon graduating, he says, he was immediately offered two jobs—and his surprising decision would take his career to places he never imagined. “One of the jobs paid deep six figures, the other was an offer on the internet to sell legal research online, a sales job with a \$250,000 comp plan,” he says. “I took that job, despite my mom telling me that the internet was just a fad and would be a huge failure,” he says with a laugh.

However, he adds that the experience was another important business lesson for him: “I tell this to people all the time: just because somebody loves you doesn’t mean they’ll give you good advice. Instead, you should go find people in the situation you want to be in and ask those people for advice.”

Even though he was a millionaire nine months out of law school, he would heed those very words as he took his career to an even higher trajectory.

Westward Expansion

Seeking to push his potential further and knowing that raising capital was a vital skill for an entrepreneur, Meltzer would next head to the West Coast to conquer the Silicon Valley. He grinded and asked experts how to go about it. And he was a quick learner, to the tune of raising over \$169 million.

After that, at age thirty-two, he became CEO of Samsung’s PC-EPhone CyberBank Division, where he experienced a life-changing career shift. He met and bonded with famous sports agent Leigh Steinberg (the inspiration for *Jerry Maguire*), who invited him to be the CEO of the Leigh Steinberg Sports and Entertainment agency. While in that role, he was introduced to Hall of Fame quarterback Warren Moon, and the two soon realized they had a common desire to help others. In 2010, they founded Sports 1 Marketing, a then-boutique sports sponsorship company that’s now also involved in marketing and media. Its mantra mirrors Meltzer’s: “Make a lot of money, help a lot of people, and have a lot of fun doing it.”



Building a Brand to Better Others’ Lives

Meltzer had created the vehicle that gave him a greater purpose. But he knew he could do more. He wanted to reach more people, so he set out to build his own brand. To that end, he approached motivational speaker Gary Vaynerchuk as a mentor. “I asked Gary how I could be the most uncool popular middle-aged man on the internet,” Meltzer says, with a laugh. “I really took on his mentorship and advice, which is, again, a vital lesson I’ve learned throughout my career. I traded my help for Gary’s help when he and his brother were starting a sports agency, and I’m still receiving great

advice from him, making it my own, and applying it every day.”

In doing this, he discovered his life’s mission. “Through my podcast, shows, books, and coaching engagements, I want to empower one thousand people to impact a thousand other people to impact a thousand other people to be happy,” he reveals. “That’s a billion people. I want to have an extreme impact on this earth by creating a collective consciousness of teaching people to be happy. I truly believe that when people are happy, they’re more productive, more accessible, and more gracious, and the whole world will change. It will be more abundant,

and there will be more than enough of everything for everyone.”

More Than Enough

The way Meltzer sees it, there are three worlds in the spectrum of scarcity and abundance—both in business and everyday life. He calls the first the World of Not Enough, where he says “There’s never enough of anything for anyone. It’s ego-based: hyper-competitive, full of anxiety, fear, and the need to be right, where people feel offended, superior, angry, resentful, you name it.”

The second world is where Meltzer believes most people live, the World of Just Enough. It blends scarcity



I FOCUS ON WHAT I CAN CONTROL, THE MOST POWERFUL THING BEING MY MINDSET.”

with abundance, where everything is traded, so something is expected back. Meltzer’s third world, however, is the target with his goal to impact one billion people. “I’m trying to educate people about and encourage them to exist in the World of More Than Enough, where there’s abundance: more than enough of everything for everyone,” he says.



MAKE A LOT OF MONEY, HELP A LOT OF PEOPLE, AND HAVE A LOT OF FUN DOING IT.”

“I have five different rules for this world that apply to business as well. First, know your personal, experiential, giving, and receiving values, and evaluate them every day. Second, ask how you can provide value to every situation, person, and thing you encounter. Third, study with a lens of productivity, accessibility, and gratitude. Next, do things now, which saves exponential time and makes you more successful. Finally, and most importantly, practice ending fear. When you’re fearful, stop, drop, and roll. Pause, figure out why you feel that way, and eliminate it. When people learn to do all these things, they’ll be more successful and happier.”

The Modern Meltzer

Today, David Meltzer is still changing lives, whether it’s as a CEO, in the pages of his three best-selling books, as a speaker and a business coach, or through his podcast, *The Playbook*, and weekly webinar, *Road to Revenue and Happiness*. All are venues that point him toward his goal of making one billion people happy—and illustrate a major change in his mindset.

“Until age thirty-six, I believed that money buys happiness,” he admits. “I now realize that money is still the most important thing,

but it doesn’t buy love or happiness. What it *does* do is allow you to buy the right things, which will make you abundantly happy, as it does for me. When I help build community centers in Africa or give to my community and my kids, I am so happy.”

And why wouldn’t he be? He has long been fueled by his never-ending gratitude for what he has, the people who have helped him on his journey, and the opportunity to help others. “I focus on what I can control, the most powerful thing being my mindset. I like to feel like I *get* to do everything, not have to, from taking out the trash to driving my daughter somewhere.” In short, he lives out the “More Than Enough” mindset he advocates for.

All of which takes him full circle, back to the person who inspired him in the first place. “I give time every day to my mom, and I always tell her four things: I’m happy, I’m healthy, I appreciate her, and I love her,” he concludes. “People don’t mind hardship, and my mom is a great example of that. What they don’t want is long hardship. That’s why consistency is so important to me, both in life and in business. I’m living proof that, when you’re consistent and persistent, you can reach your potential and go far beyond any limitations.” ■



Keeping It Real

How does former pro athlete Peter Taunton keep winning big as an entrepreneur? By making things personal.

BY MATTHEW BRADY

I AM LIVING PROOF that the American dream is alive and well." People make such statements so often, you may just do a mental shrug. But when Peter Taunton says it, you're immediately convinced—not only because of his enthusiastic, infectious personality but also because of his story.

Taunton grew up humbly in rural Willmar, Minnesota, the youngest of seven siblings, including his identical twin. The town was so small, his education happened in a two-room schoolhouse. In his close family, he learned about working hard and helping others from a young age. "My father put me to work at around age eight," he shares. "I sold popcorn in front of his grocery store. I learned valuable life lessons from that, such as the value of work ethic, not

being beneath any type of work, and immersing yourself in your community, that are still relevant today."

He would be soon putting such life lessons to the test during his first entrepreneurial venture.

Opportunity Knocks

As a teenager, Taunton was introduced to racquetball and quickly found that he was a natural at it—so much so that he dropped out of college to become a professional player. Being on tour for several years gave him access to health clubs all over the country.

One day while home from the tour, he got a call from friends who wanted him to turn around their club. "I played every day there, so I got to see firsthand what the management was doing," he recalls. "I was moving

to Orlando, and, before I left, I had breakfast with the owners. I shared my concern that the business was being hurt by the manager not engaging the members enough, and I told them to call if they wanted my help."

Eighteen months later, they did, offering him a meager \$16,000 salary but an enticing caveat: if he turned the business around, he could buy it. "That was my big break," Taunton reveals.

In only his second day in charge, Taunton was faced with his first leadership challenge at age twenty-two when he asked his team to help him clean the building. "Once I started assigning tasks, a woman named Barb stepped forward and said, 'Peter, we don't clean,'" he shares. "I just turned to her and said, 'Barb, you also don't have a job' and pointed to the door.

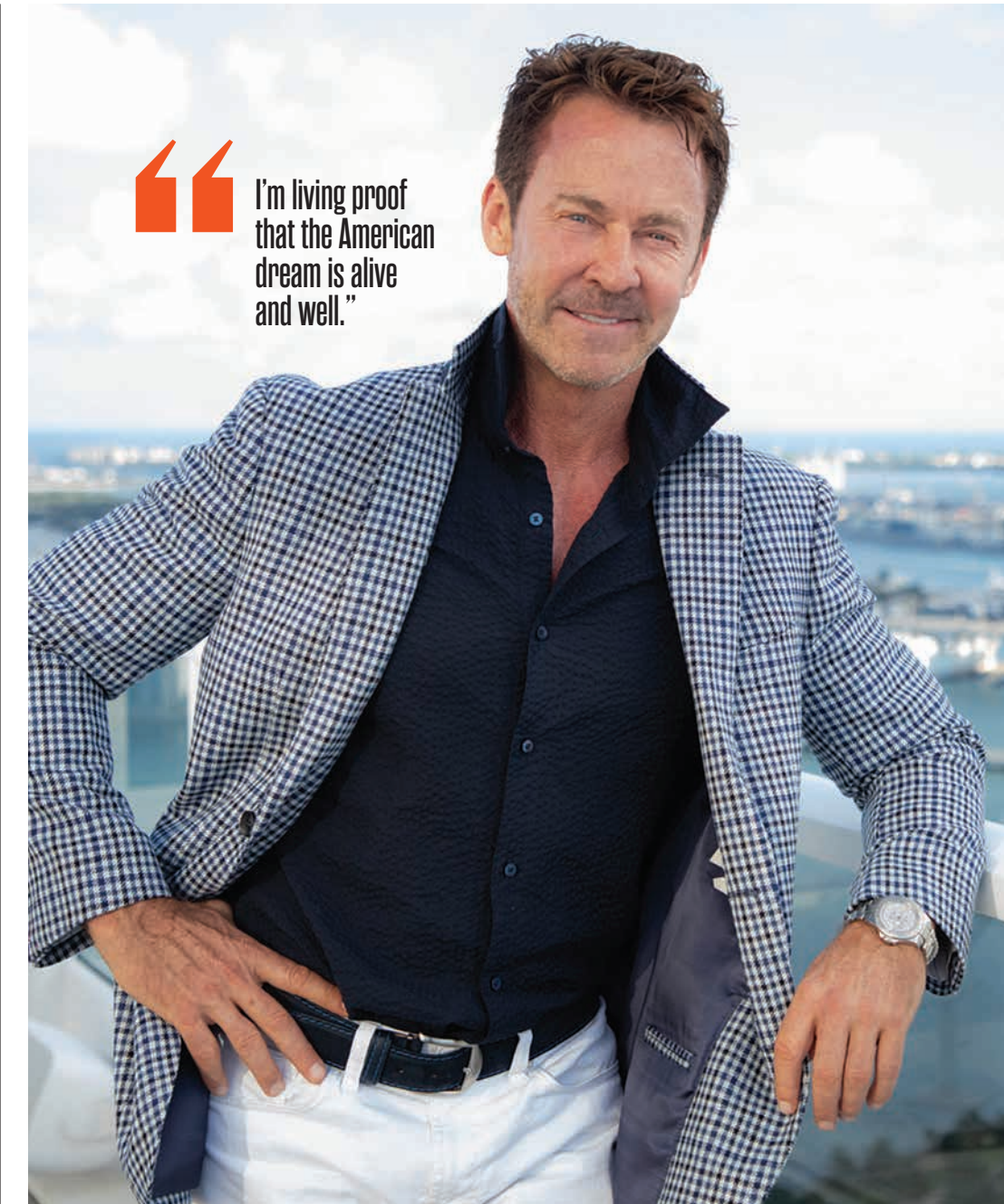
You could hear a pin drop. Everybody knew I was serious about making the club better, including Barb, who stayed." Wanting to lead by example, he even cleaned the toilets.

With no budget, Taunton had to be smart and hustle to save his club—which was losing \$200,000 a year before he took the reins. He bartered for everything, trading memberships for renovation materials, and he taught his team about customer engagement: greeting people when they came in and interacting with them. And his persistence paid off. Within five years, it was making \$250,000 a year.

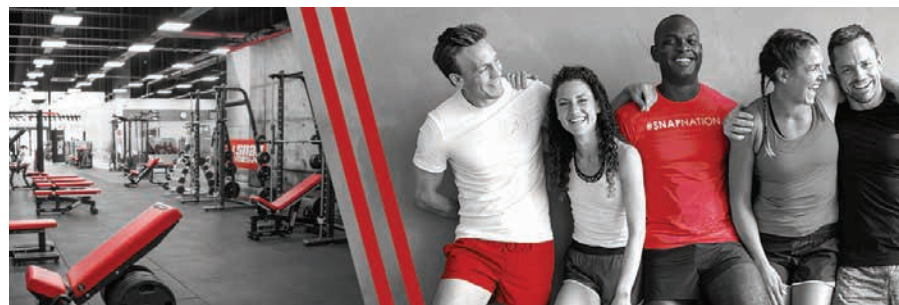
Revolutionizing Fitness

The owners kept their promise, and Taunton bought the business. By age forty, he had seven clubs, called America's Fitness Centers, which he then sold before eyeing his next challenge.

Of course, Taunton thought of customers first. He wondered whether fitness centers needed things like swimming



“I’m living proof that the American dream is alive and well.”



pools and racquetball courts and started plucking those amenities from his soon-to-be business. “Before I knew it, I had a club with only around 4,000 square feet but a lot of diversity in cardio and strength-training equipment—everything you’d need to get fit,” he says. To make it even more customer-friendly, he’d keep it open 24/7, members would have access to any club, and a monthly membership was only \$35 and didn’t require a contract.

Finally, there was location, location, location. By having a smaller footprint, his club would fit right into the neighborhood strip mall or shopping center. By being so conveniently located, people could use it more, get more value, and reach their fitness goals easier. “When I went to market, I wanted it to be different and resonate with people,” he notes. “I wanted to bring fitness to the doorsteps of America.”

And resonate it did. His new health club, Snap Fitness, was an instant success. With fewer employees and less overhead, Taunton took the formula from his city-based club and tested it with a mid-sized market and then in a town of 3,500 people. The model worked at all three locations, and he was ready to franchise. In Snap Fitness’s first year, he opened twelve clubs. By year three, there were two hundred clubs. Five years later, it was averaging more than one opening a day. Today, Snap Fitness has grown to 2,500 locations in twenty-six countries, and its parent company, Lift Brands, is the largest wellness franchise in the world, with over 6,000 locations.

His Secrets to Success

Every entrepreneur has a playbook for success, and Taunton is no different. In fact, he often compares himself to the head coach of a football team. Even though he stepped down as CEO of Lift Brands

PETER TAUNTON'S TOP 5 TIPS FOR ENTREPRENEURS

1. Have a well-thought-out plan, from concept to exit strategy.
2. Be patient.
3. Don't be afraid to fail.
4. When you fail, acknowledge it, learn from it, and try not to repeat it.
5. Never quit. “Being an entrepreneur is not for the faint of heart.”

in 2019, he enjoys sharing his formula for a winning team.

“First and foremost, I surround myself with great people,” he says. “My team members are loyal, coachable, and focus on doing their jobs well. I always say that anyone can be an all-star if you set the bar at your ankles. I like people who set the bar high.” For that loyalty, Taunton reciprocates in several ways. “I keep it real. I want everyone on my team to feel informed and involved,” he continues. “I prefer to lead with passion, compassion, and



respect for the people around me. I love fostering a team atmosphere and trying to empower and mentor people to reach their full potential. I love them, appreciate them, and have become friends with a lot of them. I like to say we’ve all had a front-row seat to the American dream.”

Peter Taunton Today

Not one to rest on his laurels, Taunton continues to lead by example. In addition to helping others succeed through consulting and public speaking, he lends time to causes close to him. As part of his effort to help military families, he helps organize an annual concert in Minnesota, Liberty at the Lake, to benefit fallen soldiers. He does business in the Serengeti, where he also helps anti-poaching efforts. And, in his latest venture to help people be healthier, Taunton is the co-owner of Nautical Bowls, a franchise of superfood-based stores.



As Taunton discusses how far he’s come, he’s both reflective and somewhat awestruck. “Running a company is a huge commitment and a huge sacrifice,” he admits. “You have to own everything, including the responsibility of looking out for the people working for you. I’ve come so far from that two-room schoolhouse to get here, and I couldn’t have done it without the life lessons I learned starting as a kid and the amazing



people I’ve worked with along the way. Knowing that keeps me humble. I’m truly blessed.” ■

Gain Clients with Growth Hacking

This technique can help you scale your business quickly and efficiently to start building long-term success.

BY RACHEL STEVENS



A growth hacker is a person whose true north is growth. Everything they do is scrutinized by its potential impact on scalable growth.”

- SEAN ELLIS



W **HAT DOES EVERY SINGLE INDUSTRY HAVE IN COMMON?** They all want to grow. However, it can be difficult for new businesses to resist the urge to model themselves like every other business in corporate America. The truth is small businesses don't need the same structure and goals as large businesses, and it's OK to adjust your goals and processes as you grow. It's easy to become too process-oriented and forget business is about results—and that's where growth hacking can help you.

Growth hacking 101

In 2010, author, podcast host, and business coach Sean Ellis coined the term “growth hacking” and defined it as a mindset that you can adopt to attain scalable growth in your business.

Some people think growth hacking is simply a buzzword, but it's not. Don't be fooled by the term hack. Growth hacking is more than a bunch of tactics and tricks, and it's certainly not a get-rich-quick plan—you must put in the work to see results.

Focus on what will help you grow *right now* and how you can use your failures as a stepping-stone. This tactic is effective for startups—it's cost-effective and efficient, using trial and error to understand what works and leave behind what doesn't.

In other words, you should be able to acquire as many users or customers as possible while spending as little as possible. But it works for other types of businesses too.

An effective growth-hacking strategy

If you're ready to start growing your business, take the time to develop a strategy first. Remember that you don't need to have every detail figured out beforehand—dive in even if you're unsure.

Leverage your following

You may not realize it, but you already have a great source of new business sitting in front of you: your existing clients. Tapping

into your relationships is an inexpensive and effective customer-acquisition method. Your customers already know you and your business, and they can refer your business to their friends and family effectively because they know and trust you.

In the late 90s, one of Hotmail's competitors spent \$20 million to attract less than half of Hotmail's subscribers. Hotmail spent only \$500,000 over two years and gained twelve million subscribers. They did so by simply placing a link at the bottom of every email that said, “Get your free email at Hotmail.” The company leveraged

Growth hackers know that lasting excitement from clients comes from action, not ideas.



peoples' desire for a free way to access their email from anywhere online, and they made it easy to sign up and share with friends and family.

However, just asking for referrals may not be enough. You have to offer consistent chances for clients to engage with you and get excited about your business, which leads to the next part of your strategy.

Find your “aha!” moment

There are usually points in your customer experience when things click, and a customer gets hooked. That's the “aha!” moment you need to pinpoint and use. Once a customer reaches this point, they become a raving fan of you and your business.

Growth hackers know that lasting excitement from clients comes from action, not ideas. A classic way to hook your customers is to develop a personal relationship with them through conversations and stories that turn you into a friend. Don't feel discouraged if you don't connect immediately with a client after one personal conversation. All good



relationships take time to blossom. With growth hacking, it's vital to try a wide variety of tactics with different people to see what sticks the most.

Looking through their analytics, the growth team at Twitter discovered that people who followed at least ten other people on the platform were dramatically more likely to be active users than those who followed less than ten. That "aha!" moment became the focus of their efforts. It was the impetus for the "People to Follow" feature, among others. Once Twitter's team optimized for this metric, its user retention and engagement rates rose significantly.

Test small and scale

The fact is, while you can hypothesize what's going to work, you never know until you test it. Ellis even admitted most growth ideas fail. That's why he believes it's vital to explore a wide variety of options.

Relationship marketing is a personal approach, which means it usually lacks the structured tests some other marketing approaches use. However, that doesn't mean you can't measure and learn with relationship marketing, and you can easily do so by testing small and scaling up or down appropriately. Here's how to do it:

If reaching out to the bulk of your client list seems daunting, it's time to automate.

1. Develop ideas for strengthening relationships, such as posting on social media or sending newsletters. Write down as many realistic ideas as possible.
2. Try each of your ideas with your clients using a cross-sample of your client list. Set a specific time frame, such as three months, to ensure your ideas are working.
3. Record the results of your cross-sample in terms of referrals and other KPIs. For example, write down if you learned something personal about your client and if the client approached you for a follow-up conversation. Give every KPI a point, and tally the points for each method.
4. Analyze which of your efforts gave you the best return on your time and resources. Scale back on any methods that didn't yield promising results.

Automate whenever possible

If reaching out to the bulk of your client list seems daunting, it's time to automate. You only have so many hours in a day and many crucial tasks to accomplish, so automating emails and streamlining processes can free valuable time for you to focus.



Nowadays, many people hire a virtual assistant from an affordable site like Fiverr or Upwork to support their outreach tasks.

When Airbnb was first trying to gain traction in the short-term rental market, it developed a way to integrate their service with Craigslist. Listings on Airbnb were automatically posted to Craigslist as well. As a result, when people visited Craigslist searching for a place to stay, they found Airbnb listings with a link to the Airbnb site. Airbnb could also reach Craigslist users by email to promote the ability to post to both platforms without any extra effort.

Actionable items

Consider the four A's—assess, ask, act, and analyze—when taking actionable steps toward growth hacking. Implementing these tips can help you find success with this method.

Assess

Update your client list, look through your contacts, and assess what you believe your clients appreciate the most about doing business with you.

Ask

Ask your top clients what they appreciate about your business, and use this information to compare your beliefs to what clients are thinking.

Act

Arrange a plan to connect with your clients. Start by posting more frequently on social media and direct-messaging top clients. Ask them what they think of your content to gain insight into your clients' preferences. Be sure to follow up with another conversation soon. You should also send email newsletters. Use the newsletter as a direct way to follow up with recipients.

Analyze

Analyze your results by looking at the following:

Social media:


evaluate how many views, likes, and comments your content is getting, how many responded to your message, and if you learned anything new about your clients.

Email newsletter:

look at how many clients opened your newsletter, how many responded to your follow-up, and if you gained any insight into your clients' lives.

If social media performed better, scale back the frequency of your newsletters to focus on posts and messages, and vice versa if email performed better.

Growth hacking is about small actions that make you work smarter, not harder, to grow your business. By focusing on strengthening your relationships in a cost-effective and time-saving way, you can grow your business quicker than you expected. ■



Growth hacking is about small actions that make you work smarter, not harder, to grow your business.

Get More Leads with LinkedIn

Are you using LinkedIn to its full potential? Lead-gen expert Jimmy Coleman gives his top four tips for using the networking platform for highly effective prospecting.

BY ALEXA BRICKER

EVERYONE IN THE BUSINESS WORLD IS

familiar with LinkedIn. It's the premier digital networking platform for business professionals.

But behind the carefully curated work histories and enthusiastic endorsements, the platform offers a host of benefits for businesses and entrepreneurs. LinkedIn could be a lead-generating machine for your business, but you must harness the site's full potential.

Jimmy Coleman is the founder of LeadBaller, a first-of-its-kind LinkedIn service for B2B companies. LeadBaller has helped some of the biggest brands in the world capitalize on



When you present yourself as the lead authority in your sphere, prospects have no other choice but to respect and trust you.

LinkedIn's lead-generating capabilities, and Coleman's strategies can be applied to any business—big or small—to achieve the same result.

Optimize your profile.

When you present yourself as the lead authority in

your sphere, prospects have no other choice but to respect and trust you.

Coleman advises to avoid doing what everyone else is doing. You'll get lost in the shuffle. The easiest way to show authority and authenticity is through

selling social proof. Most people use their LinkedIn banner image to show their logo or location, but you can do better. For example, if you've hosted a handful of seminars, make your LinkedIn banner a picture of you speaking to an audience. This

shows prospects that you have the experience and leadership they need. If you don't have images to highlight your authority, go down the authenticity route and give prospects a glimpse into your personal life by showcasing your family or interests.

Target your ideal client.

LinkedIn allows businesses to create campaigns through platforms like Sales Navigator, target specific audiences, and collect data to retarget and optimize these ads. Like all other forms of marketing, you'll want to make sure you're not wasting valuable client-acquisition dollars on prospects you don't want to work with anyway.

Before you begin using LinkedIn for prospecting, you should clearly define your audience and set goals for the quality of the leads you want to capture. According to LinkedIn's in-house training program, LinkedIn Marketing Labs, you should ask yourself these questions before launching a targeted ad campaign on the platform:

1. How do I define a sales conversion?
2. How long is my sales cycle?
3. What does a quality lead mean to me?
4. Am I using marketing automation tools?
5. What is my sales team's lead response time?
6. How am I nurturing my leads?

Connect with prospects.

Your prospects' inboxes are already flooded with messages from businesses just like yours. Spam emails and even a lack of replies could put you and your prospecting efforts in dangerous territory. Instead of directly messaging prospects, put your name and brand in front of them in other ways first.

Most LinkedIn users log on, check their notifications, and log off, so you want to make sure you are showing up in their notifications. Three of the best ways to do this are by liking posts, commenting on posts, and endorsing skills. Endorsements can be particularly lucrative

because an endorsement prompts the recipient to message you back, starting a conversation without you ever messaging them first.

Don't forget to follow up.

It's not enough to connect with a lead once and hope they come running right to you. Follow-up is key. However, this kind of outreach needs to be tailored and thoughtful to make an impact.

Instead of this:

"Hi, my name is John. I'm a financial advisor with Main Street Community Bank. I want to help people like you feel secure in their financial future. If you ever need help with your finances, feel free to reach out."

Try this:

"Hi [prospect's name]. Thanks for connecting with me. I'm John, a local financial advisor and

father of three. I saw your recent post about sending your son off to college. Congrats! You must be so proud. I wanted to reach out because I know the stress of putting a child through college, and if you have any questions, I'm here to help.

PS Love the quote in your bio. Steve Jobs is one of my biggest inspirations too."

The difference between these two messages is palpable. One is generic, forced, and likely to be ignored. The other touches on a personal life event and an experience that unites both financial advisor and prospect. You can even opt for sending audio messages on LinkedIn as opposed to text messages, which disrupts the pattern of other messages in your prospects' inboxes. ■



For more information on optimizing your LinkedIn prospecting, visit LeadBaller.com



5 Ways to Effectively Manage Remote Employees

Managing a remote team has its challenges. But with effective management and constructive methods and policies, you can build a positive company culture and boost productivity for your work-from-home employees. These tips from four top business executives will show you how.

BY LAUREN KIM





SINCE COVID-19 HIT IN 2020, the way we live and work has changed forever. “Remote working isn’t going away,” says Alison Schwartz, owner of the boutique consulting firm Grow Strategic Solutions. Companies with effective work-from-home policies and support systems in place will benefit. “Employers who adapt and adjust will retain and attract high-quality staff,” Schwartz says.

Whether your workforce is completely remote or you function on a hybrid model, you need a well thought-out game plan for effectively managing employees who work out of the office. These management strategies will help you foster a productive and happy team.

Promote dialogue

Managing remote employees has its hurdles. For example, it can be difficult to keep channels of communication open. “There’s value in being with people, connecting with them, and understanding your organization’s culture that being remote might not give you,” says Brian Crowley, assistant vice president, human resources and operations at the Aerospace Industries Association. “You have to formalize methods of communication. There are passive forms of communication and little



interactions, such as in the hallway at work or if you grab lunch together, that you don’t have when you work remotely.”

The Aerospace Industries Association had a 100 percent in-office policy before March 2020, but since COVID, it has fluctuated

between supporting a completely remote workforce and operating on a hybrid model and was fully remote at press time.

Since the early stages of the pandemic, the trade organization has been regularly assessing the needs and wants of its employees

through surveys and virtual meetings. It asks its managers to frequently check in on employees to gauge their needs, objectives, and challenges. “You should formalize team meetings and one-on-one sessions, and you need to think about gauging how employees are feeling,” Crowley says. “Managers

need to get used to asking questions they wouldn’t normally ask, such as, ‘How are you doing?’ You need to create some of the social conversations that organically happen in an office.”

Schwartz recommends using additional communication methods,

such as video chats and instant messaging, to keep in touch with remote employees.

ReminderMedia, which provides marketing solutions to sales professionals and business owners, became a fully remote organization in 2021. The company employs various methods to keep its workforce cohesive and connected, such as hosting regular company-wide and departmental remote meetings using communication platforms that include Zoom and Microsoft Teams.

Meet employees’ needs

When employees work in an office, they have access to supplies, such as a computer, a phone, and a desk. It’s good policy to meet your remote workers’ basic equipment needs too.

Joe Fuld, president of the Campaign Workshop, an advocacy and political advertising agency, used to rent a 4,000-square-foot office space but chose to make his company entirely remote in April 2020. He has instituted several policies to mitigate common stressors associated with remote work. For example, he now rubber-stamps all requests from his staff for equipment and supplies that fall under \$250. “It’s really important for employees to have the freedom to



order their own pens, lap desks, and office chairs," he says.

He also provides his staff with an internet and cellphone stipend, matches employees' charitable donations, and at one point sent four rapid COVID tests to every member of his workforce. "We had employees who were stressed about finding the tests," he explains. "A lot of the big stressor issues are little things that an employer can fix."

Be flexible

Working from home might not be suitable for all remote workers, so Fuld gives his employees a yearly travel stipend. "If you want to get out of your house and rent a place and visit family or whatever, we will give you \$300 a year to work from anywhere," he says. "We don't really care where your office is as long as you get your work done."

Remote workers want employers to be flexible about how and when they



You have to be very intentional, open, and consistent," Acree says. "If you do that, you will have a successful remote team."

can work, Schwartz says. "You can always negotiate terms and boundaries or maybe have a trial period with benchmarks and check-ins along the way. It's important for both employer and

employee to give honest feedback about how the arrangement is working out for them," she says.

Add structure

Managing remote workers requires unique skill sets.

It's helpful to set up goal expectations so everyone is on the same page in terms of productivity requirements. Many companies use task-management software to set goals and monitor employees' performance. For instance, ReminderMedia uses task-management platforms, such as Wrike and Jira, to track projects, the completion of assignments, and the amount of time spent on tasks and projects. Platforms like these are useful not only for the employer but also for employees. "We found that the more an employee understands exactly what they are supposed to do, the better they'll feel about themselves and the better the company feels because it's achieving what it wants to achieve," says Luke Acree, president of ReminderMedia.

You might also want to set guidelines to structure employees' workweek and their interactions with

each other. "The bad thing about working remotely is that you are always at work," Crowley says. "It's very easy for work to creep into your home life."

He notes that it's helpful for managers and supervisors to model behavior that benefits their employees. For example, if a supervisor regularly sends emails to employees at 9:00 p.m., the people they supervise will feel obligated to respond at that hour, he says. He adds that an executive he worked with in the past stopped work promptly at the same hour every day. He did this so that his employees didn't feel obligated to work overtime.

Boost morale

Employees can feel isolated when working remotely, so it's important to take steps to boost morale. "Before, when you looked at our company culture and asked why everyone loved ReminderMedia, everyone

would say the people. One of our biggest fears with going remote was that people wouldn't be able to interact with each other anymore," Acree says.

So at ReminderMedia, managers often plan virtual social activities for employees and will sometimes include icebreaker games in virtual meetings. Acree and his staff also send treat baskets to employees at holidays, and workers get a free membership to Calm, an app used for reducing anxiety and stress. "We want employees to know we care about them, we are thinking about them, and we appreciate them," he notes.

With careful planning, you might find that having a remote workforce is the best thing for your company. "You have to be very intentional, open, and consistent," Acree says. "If you do that, you will have a successful remote team." ■



The 4 Pillars of Great Leadership

Being a leader means being committed to improving yourself, and these four pillars are the foundation for strong leadership no matter what business you're in.

BY LUKE ACREE





This statement might come as a surprise, but there's no such thing as a natural-born leader. You can be born with an inclination toward leadership or a drive to lead. However, the foundation required to become a great leader must be built from the ground up.

You wouldn't build a new home without a foundation and expect it to be structurally sound, and the same applies to your approach as a leader. You have a responsibility to your people—and to yourself—to focus on the behaviors, actions, and mindset that will motivate your team to success. When implemented, the four pillars that follow can fortify your value proposition, grow your team, and, most importantly, drive your vision.

1 Leaders must set the vision.

In *The 7 Habits of Highly Effective People*, Stephen R. Covey explains that you should “begin with the end in mind.”

A company vision is a means to an end; however, the endgame



may be different for a team member than their leader. The key to a successful vision is to have one through which others can reach theirs alongside the company's. So to be a strong, effective leader, you should take the time to understand each team member's individual goals and how they can be achieved by getting onboard with your overall vision.

For example, if you have a team member whose goal is to make \$50k in commission this year, you should foster that employee's growth in more specific terms: \$50K per year equates to roughly \$4.2K per month. To reach that goal, how many sales do they need to get per day? Per week? How many leads must they call per day to hit that sales goal? The more sales they get, the more commission they get—and the more sales your employees make, the more revenue you make.

In short, the fastest way to get what you want is to help others get what they want. It's a win-win for everyone

involved, which is what truly great leadership is all about.

2 Leaders must inspire people through that vision.

Everybody you hire has a valuable skill set that benefits your company. But the tasks accomplished through those skills shouldn't be the primary focus; instead, it should be the overall vision—why everyone at the company does what they do.

As a leader, it's vital to consistently remind your people, if not evangelize them, about your vision and why you are passionate about it. If you truly inspire them, the company vision will become second nature to them because they know it's a mutually beneficial partnership.

Think of the parable of the bricklayer. One day a man observed three bricklayers on a scaffold: one crouching, one half standing, and one standing upright. He asked the bricklayers what they



were doing. The crouching bricklayer said, “I’m a bricklayer. I’m working hard to feed my family.” The second bricklayer replied, “I’m a builder. I’m building a wall.” When he asked the third bricklayer, he replied with a gleam in his eye, “I’m a cathedral builder. I’m building a great cathedral to The Almighty.”

When you have passion behind your *why* and put your vision in perspective, it’s not hard to get people to follow you. People want to do this naturally. Find the people whose vision aligns with yours, and your message will carry.

3 Leaders must demand accountability.

The role of a leader is not to tell people what they want to hear but what they need to hear. A good leader should be able to foster greatness in their

employees and bring out qualities that they may not even know are there. Should you hold people accountable for their responsibilities and goals? Absolutely. But even more important than doing so for the company’s sake is doing it for your employees’ sake—seeing someone’s potential for greatness is the most accurate way to define a leader.

In his book *The Advantage*, Peter Lencioni explains the importance of running a “clarity exercise” after meetings. These exercises are designed to get everyone on the same page about the action items from that meeting. If you don’t do a clarity exercise, he says, everyone will have their own interpretation of the goals.

Accountability is tough love. But it’s necessary. Think about Michael Jordan and Tom Brady, two all-time

greats who never took their foot off the accountability pedal with their teammates. In doing so, these leaders provided clarity for how to win and helped them be the best players they could to achieve an overall vision of greatness. To be the best in the world, you need to crave accountability.

4 Leaders must serve.

While it’s critical to hold your employees accountable, you can’t do so if you aren’t willing to walk with your people within the accountability. If you set an expectation for your employees to start work by 9:00 a.m., be in the office ready to work by 8:00 a.m.

Perhaps just as important, leaders lead by example by being the first to dive in and get their hands dirty. They convey that they’ve been there and understand how their people feel—and then show them how to accomplish what is needed. And it’s not a one-time-only gesture; they constantly stay mentally present and engaged with their workforce. This is exactly

why I’m often in meetings with my teams and with the entire company. I have a blast, everybody enjoys the chance to get together, and good, productive discussions take place.

Great leadership isn’t innate. Instead, it needs to be fostered with intentionality and purpose. Incorporating these four pillars of leadership can build a strong foundation for successfully achieving your company vision and inspiring your people to meet theirs. ■



About the author: Luke Acree is an authority on leadership, a lead-generation specialist, and a referral expert who has helped more than 100,000 entrepreneurs and small businesses grow their companies. He hosts *Stay Paid*, a sales and marketing podcast, and has been featured in *Entrepreneur*, *Forbes*, and *Foundr.com*.



RISK REVIEW

Having a “heads-up” for all of life’s potential risks would be ideal... but since the unexpected is, well, just that—proper risk provisions are **key to protecting your wealth.**

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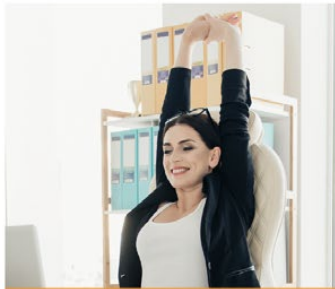


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Take Action

Write down one way that you will apply each of these pillars to your role as a leader, and implement them into your daily routine.

Front of Tear Out Card 2



STAY FIT WITHOUT LEAVING YOUR DESK

If you have a desk job, then you know how common it is to feel stiff and sore at the end of the week. To keep your mind and body limber during the workday, here are our best desk-friendly exercises.



Paul Sanders
Private Wealth Advisor



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Back of Tear Out Card 2



NECK ROLLS

Drop your chin down to your chest, and relax your shoulders. Do 3-5 rolls slowly in one direction, and then switch directions for the same amount.

WALL PUSH-UPS

Stand at arm's length facing the wall. Keeping your feet planted and your hands on the wall, lean your upper body toward the wall, and push back out.

WRIST ROLLS

Roll your wrists around in a circular motion. Roll clockwise 10 times, and then counterclockwise 10 times. Repeat every hour or so.

REACH FOR THE SKY

With your arms above your head, interlock your fingers with your palms up. Push your right wrist higher, and then your left wrist.

THIGH STRETCHES

Sit on the right side of your chair. Grab your right ankle, and pull it toward the bottom of the seat. Hold stretch for 30 seconds. Then switch sides and grab your left ankle to repeat the stretch for the left side.

WALL SITS

Lean your back against a wall, and lower yourself into a sitting position with your legs at a 90-degree angle. Keep your legs and knees together, and hold for 30-60 seconds.

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