Compliments of Stacey Shanner

ISSUE 30

BUSINESS IN ACTION

HOW TO ESTABLISH EFFECTIVE TEAM GOALS

Stacey Shanner
REALTOR®

WHAT'S YOUR HOME REALLY WORTH?

SHANNER REALTY

SCAN TO SEE YOUR ESTIMATED HOME VALUE!

Front of Tear Out Card 1

Update Your Sales Playbook for Summer

These warm, exciting days are brimming with opportunity for more closings. Leverage this time to communicate this enthusiasm to your customers. This card includes some powerful changes you can make to your sales playbook to suit the season.

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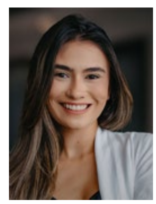

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Back of Tear Out Card 1

Adjust your value proposition
Your products or services may be especially valuable to your customers this time of year. Think about how they address seasonal challenges (e.g., the weather, travel, or children on break), and edit your scripts so your sellers can express the value proposition during sales communications.

Mention seasonal deals
If you're offering any appealing promotions this season, such as a free first week of membership or a gift with purchase, mention these early in sales conversations. Your scripts should also remind sellers to bring these up when addressing customer objections.

Appeal to pet owners
One of the easiest ways to build a strong rapport with customers is to personalize your messaging. And what better way to do so than by discussing four-legged friends? Note in your playbook's buyer personas which ones own pets, and customize emails, texts, and letters of gratitude to them with animal-focused language to boost engagement.

Update your bragging rights
Finally, don't forget to adjust any statistics in your sales playbook to ensure that they include documented successes, such as the number of five-star reviews your product has received or how much time it can save clients. As with promotions, this language should be scripted to come up early in sales conversations.

Follow these tactics, and you can appeal to more leads this summer and potentially close more deals come autumn.

Dear Bill and Judy,

The start of a new year has a way of compelling a business to raise the stakes. But momentum isn't built on enthusiasm alone. It's built on clear thinking, honest reflection, and the discipline to act on what you intend. This issue of Business in Action is designed to lead you in achieving these objectives and more.

Start by focusing on what insights you can glean from the previous year. One piece inside challenges you to resist carrying last year's assumptions into this one. Before locking in a single goal, spend real time on business forensics, examining which activities drove results and which only consumed resources.

From there, the conversation shifts from contemplation to action. An objective that's clear to you as a leader can still be invisible to your team, so you'll get guidelines that can help you provide better clarity and allow everyone to strive toward the same outcome.

Rounding out this issue's leadership focus is a practical framework for narrowing priorities, building communication standards, and measuring outcomes. Because the first quarter isn't just a starting point; it's a diagnostic that can compel you to turn more of your goals into consistent follow-through.

Here's to a year built on taking your business to the next level. As always, it's a pleasure to send you this magazine.

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REALTOR® EQUAL HOUSING OPPORTUNITY

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The New Year Reset

The calendar doesn't reset a business; the owner does. Yet many don't. BY **DAN O'BRIEN**

JANUARY arrives and most business owners carry over the same practices. They have the same priorities, resource allocation, and underlying assumptions, except now they've slapped on a new coat of enthusiasm. Continuity matters, but it's often the problem because it means last year's mistakes get carried forward alongside last year's wins, and nobody stops to check which is which.

The first weeks of the year are still early enough to do that checking by way of some business forensics. The question is what last year actually revealed. Which activities drove revenue and which consumed time without return? Where did constraints

emerge that were never anticipated? Which decisions compounded over twelve months and which ones drained capacity so gradually that nobody noticed until it was expensive to stop?

Most people skip this because it is uncomfortable. After all, it requires looking at where resources were misplaced or at work that felt productive but produced little. That discomfort is precisely why it's worth sitting with it before the new year's decisions calcify in the same way.

Goals accumulate inertia, so a target set eighteen months ago under different market conditions and pressures doesn't automatically remain the right target today. Effective operators strip the goal set back to what current constraints make achievable and what current leverage makes worth pursuing. Carrying outdated ambitions forward is often avoidance disguised as discipline.

The output of your review shouldn't be a new plan. You want to establish a shorter, cleaner set of inputs with fewer assumptions carried forward unchallenged and a real picture of what the business actually responded to last year. That's the only honest foundation for deciding what to ask of it next. ■

Take Action

Run this review before you lock in a single goal for the year, and you'll make fewer decisions you'll have to undo by March.

LEADERSHIP

HOW TO ESTABLISH EFFECTIVE TEAM GOALS

Many teams operate with objectives that exist on paper yet fail in practice. However, clear structure and visible accountability can turn them into much-needed daily operating tools.

BY **MATTHEW BRADY**

TONY ROBBINS HAS SAID THAT "SETTING GOALS IS THE first step in turning the invisible into the visible." But what happens if there's a disconnect during that transformation—namely, they are clear to you as a leader but come across as hazy to your staff?

This happens frequently with team goals. Implementing such guiding lights in your company is most effective when you turn them into something people can truly act on every day. The best approaches for doing so balance clarity, alignment, and accountability without overcomplicating things.

First steps

Start with clear, outcome-focused goals. Put yourself in your team members' shoes: A vague edict like "improve performance" doesn't translate into action. Instead, define what success looks

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like from the start in measurable terms, such as "increase client retention by 15 percent in Q3." Frameworks like objectives and key results (OKRs) and SMART goals—those that are specific, measurable, achievable, relevant, and time-bound—can certainly help here because they force precision from everybody.

Just as important, connect them to company priorities. People are far more engaged when they understand why something matters. If it's clearly attached to a company-wide objective, it feels less like busywork and more strategic. Again, this alignment should be explicitly communicated after the direction has been finalized, not assumed, at a reliable time, such as quarterly.

Breaking down and building up

Now it's time to get into the weeds: turning the goals into actionable pieces. Assign clear ownership as well—every key result should have someone directly responsible for it.

After that, build them into your team members' regular workflows whenever possible, such as during weekly check-ins, team meetings, and dashboards. Use simple tracking systems (project tools and shared docs would be examples) so everyone can readily see progress and discuss it regularly. Big objectives often fail when they stay abstract, so translate them into quarterly, monthly, or even weekly milestones.

You'll also want to encourage consistent feedback loops. Don't wait until a fixed date, such as the end of a quarter, to realize that something is off track. Instead, regularly review progress, identify blockers, and adjust if needed.

The result? Every team member should know where both they and the objectives stand *right now*.

Remember the four Rs

Finally, focus on four key elements: recognition, reinforcement, reviews, and retrospection. When teams hit milestones or make meaningful progress, shout it from the rooftops (or at least in a company meeting or newsletter). This reinforces desired behaviors and maintains momentum.

The last piece of the puzzle, retrospection, happens after task cycles have completed. At this stage, you'll want to look back and ask key questions like "What worked and what didn't?" "Was what we set realistic?" and "Did people understand them?" Such reflection may actually provide the best means for your team to improve their execution the most over time.

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Another prominent motivational speaker, Zig Ziglar, said that "you can't hit a target you cannot see." That's the heart of the matter with formulating goals for your team—the task may seem simple, but that can be deceiving and often runs counter to reality. Take the time to sit back and determine how to turn these approaches from planning documents into daily operations, and you can better ensure that everyone in your company is moving toward the same destination. ■

Take Action

Discuss with your managers how your company can start implementing these strategies for more hyper-focused, productive team goals.

Early-Year Execution Playbook

The gap between strategy and results often widens fastest when leaders assume the plan will be successful rather than building the systems that make execution inevitable.

BY **DAN O'BRIEN**

As every leader knows, the first quarter is a diagnostic. It tells you whether your business runs on intent or discipline.

Strategic plans are rarely the problem. Most are directionally sound. What fails is the translation: the moment when a well-reasoned plan meets a team carrying twelve priorities, operating on assumed alignment, and responding to whatever landed in the inbox that morning. By March, the strong January energy has likely turned into a fragmented effort, and the gap between what was planned and what is actually happening has become expensive.

Closing that gap is an operational issue. It requires specific decisions about structure, cadence, and accountability. These need to be made early, before your goals and focus begin to drift.

→ Narrow the priorities

A common mistake is attempting too much at once. Ten initiatives feel like ambition; however, they function like dilution. Effective operators constrain the list to priorities that directly influence revenue, retention, or operational capacity. Then, they apply a simple test to each: Does this matter this quarter or just eventually? Work that passes the test gets a clear owner and a defined outcome. What doesn't gets delayed or removed.

This constraint may be uncomfortable. It forces tradeoffs that feel like concessions. But without it, your team defaults to activity that feels productive without producing impact.

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A common mistake is attempting too much at once. Ten initiatives feel like ambition; however, they function like dilution. Effective operators constrain the list to priorities that directly influence revenue, retention, or operational capacity.

Busyness becomes the metric, and busyness does not compound.

→ Translate quarterly goals into weekly commitments

A quarterly goal is hope with a deadline. Each priority should have a short list of completable, measurable commitments that reset every seven days. This does two things: It creates a compounding cadence of progress, and it reveals friction early. Missed deadlines, unclear ownership, and unrealistic scope often become visible in week two rather than week eleven.

→ Treat alignment as an operating condition

This is the state in which every team member can articulate the current priorities and explain how their work connects to them. That level of clarity is difficult in an organization with poor communication, and it is worth engineering deliberately.

When alignment is real, coordination costs drop. Individuals make better decisions independently because they understand the context. Conflicting efforts, duplicate work, and stalled handoffs are almost always symptoms of misalignment that was assumed away rather than verified. Clarity established at the leadership level must be translated explicitly at every level below it.

→ Build communication rhythms
Execution requires a plan, not just good intentions. Short weekly check-ins maintain forward motion and prevent the drift that accumulates between longer review cycles. These are accountability sessions, not status meetings, and the distinction matters.

Shift from “What are you working on?” to “What did you commit to last week, and what happened?” That framing changes the operating culture. It signals that the organization tracks outcomes, and, over time, that signal shapes behavior.

→ Sustain outward activity
Outward activity produces revenue: sales conversations, partnership development, and market visibility. The mistake many teams make in the first quarter is waiting until internal systems feel sufficiently organized before engaging the market. High-performing organizations invert this instinct. They set daily or weekly outreach targets and hold them regardless of internal imperfection.

The pipeline built in January and February feeds the results reported in Q2 and Q3 for most businesses. Consistency is the variable that matters most here, not intensity. Small, repeated actions compound across a quarter in ways that sporadic bursts cannot replicate.

→ Measure outcomes, not activity
Most teams track what is easy to report rather than what is connected to performance. Activity metrics (calls made, tasks completed, and hours logged) are visible and simple to capture. They are also loosely tied to results. Replace them with indicators that directly reflect business performance, such as qualified opportunities created, deals advanced, retention rates, or cycle times improved.

When measurement is precise, it sharpens behavior in real time. Your teams adjust quickly because the signal is clear. When measurement is imprecise, your teams optimize for the metric rather than the outcome and the gap between reported progress and actual progress widens.

→ Adjust without losing direction
First-quarter conditions change. The discipline is to adjust tactics quickly while holding the strategic objective stable. These are different decisions, and conflating them is where your organization can lose coherence. A team that iterates weekly on how it is pursuing a goal maintains momentum. A team that relitigates the goal itself every time conditions shift never builds it.

The businesses that convert planning into measurable progress are the ones that narrowed their priorities, broke them into weekly actions, verified alignment, maintained outreach, and measured what mattered. They did this consistently, from the first week of January forward. That operational discipline is the differentiator. Everything else is just a plan. ■

Take Action

Run this playbook from the first week of January to help close the gap between what you planned and what you actually deliver.

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The 555 Method Explained

Inconsistent outreach can weaken sales pipelines and diminish client engagement. This innovative approach offers a monthly framework for you to steady your outreach and keep these crucial relationships intact. BY **ANDRE RIOS**

YOUR CRM MAY BE BRIMMING WITH names, but how many of them actually hear from you regularly? If you aren't following up often, especially after making a sale, these lucrative relationships could weaken over time, reducing repeat transactions and leading to lost revenue and increased acquisition costs as you seek out new clients.

Sales research consistently identifies follow-up frequency as a key driver of conversion. The 555 Method provides clear guidelines meant to help you stay on track and minimize customer loss.

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Structural intervention

Devised by successful real estate agent Nick Waldner, CEO of the Waldner Winters Team, the 555 Method suggests using a simple structure: sending five calls, five social media interactions, and five handwritten notes to fifteen different clients each month. Complete five calls for those who have not been contacted, followed by five social media interactions for those who have been called, then prepare five notes to mail out to those who have been contacted through the previous step.

This system encourages consistent contact with your base without overloading any single individual—or yourself—with a vague, unguided task like "follow up with clients today." While the program doesn't guarantee immediate revenue, its goal is to create a predictable outreach volume without stressing your workload. Further, its core principles offer tremendous referral, sales, and relationship-building opportunities for most relationship- and referral-driven businesses, whether B2B or B2C.

The components

Phone calls
Make five-minute phone calls to address follow-ups, acknowledge milestones, or check in on recent transactions. These interactions can surface new opportunities because they spark authentic conversations.

Social media interactions
These lighter touchpoints require less time and allow you to quickly acknowledge events like birthdays, house closings, or anniversaries on your clients' socials.

Handwritten notes
Mailing a physical letter after a sale or sending holiday greetings can help you stand out from an overcrowded field of marketing communications. Even a short, non-salesy message can help reinforce client relationships, especially if it's printed attractively and warrants being displayed in the home or office.

Utilized together, these channels balance frequency, impact, and—most importantly—consistent outreach to clients that could otherwise be lost. It also eliminates a common human factor from the equation: avoidance. Many professionals hesitate to initiate contact due to fear of rejection or concern about being intrusive. However, structured outreach reframes communication as relationship maintenance rather than unwelcome sales calls.

Embedding the method into your team's routine

First, allocate a forty-five-minute task each week for your sales and retention teams to perform outreach before meetings begin or right after lunch breaks.

To identify who to contact, refer to your CRM system. Categorize relationships by type, such as lapsed contracts, recent subscribers, or referral partners. Organizing people in this way ensures that no group is ignored.

A monthly workflow might look like this: completing five phone calls at the beginning of the first Monday of the month, then making five social media contacts the following Monday, then writing and mailing five notes the third one.

Such a sequence reduces decision fatigue and creates a repeatable routine. For precise tracking, implement CRM tags, spreadsheets, or simple checkmarks to record each touchpoint.

As you monitor your results, observe and note how clients respond. How many call or message recipients engage in warm, two-way conversations? How many report that they want to refer a contact? How many reach out and directly express that receiving a handwritten note inspired them to do so?

Measurable impact

Using the 555 Method could offer tremendous results. Over a month, the system produces fifteen total client interactions across three channels—a rate that can lead to higher referral visibility.

More conversations create more entry points into the sales process, which stabilizes your pipeline. Instead of relying on a small number of opportunities, your business can develop a broader base of potential deals.

Take Action

Lay out a schedule for each member of your team to contact fifteen clients every month, and measure its results as weeks pass.

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For example, when a past client receives a message within the last month, the likelihood of recall improves during referral opportunities.

Conversion outcomes could also gradually increase. More conversations create more entry points into the sales process, which stabilizes your pipeline. Instead of relying on a small number of opportunities, your business can develop a broader base of potential deals.

Potential risks

Granted, some professionals may hesitate to take this approach. Fifteen rote monthly actions could feel superficial if salespeople don't execute them with intention and an amiable attitude. The key is to continue placing the client relationship first. Express in ongoing meetings with your team why these efforts aren't just routines but crucial touchpoints for the organization (and salespeople with quotas) to exceed goals.

Rigid adherence to the 555 Method may also create fatigue. Completing the same workflow every month requires discipline, and some salespeople may struggle to sustain it over several months without consistent oversight and results tracking.

Address these concerns, and the approach could offer effective results for your organization. Over the next quarter, for instance, your business might record improved engagement. If so, make note of these changes. If not, you may need to move on from the strategy.

Staying on track

Rather than relying on motivation or memory, the 555 Method creates predictable behavior that supports ongoing relationship maintenance. Best of all, it helps you continue mining relationships for lucrative opportunities while nurturing more familiar relationships between your brand and your contacts. ■

START THE YEAR STRONG

Businesses often fail from a shortage of limits. The ones that outperform often begin by deciding what to stop. BY **THOMAS MAYE**

THE BEGINNING OF THE YEAR creates pressure to do everything at once. Without a forcing mechanism, teams default to activity rather than progress. A structured checklist provides that mechanism, turning the annual reset from a motivational moment into an operational one.

DEFINE YOUR PRIORITIES

Most businesses carry too many goals into a new year. Limiting focus to one to three specific priorities creates the direction that makes tradeoffs possible. These should be concrete enough to guide decisions: a revenue target tied to a specific channel, expansion into a defined market, or a measurable efficiency gain in operations. Anything that doesn't directly support these priorities becomes secondary. That boundary must be enforced.

GET THE NUMBERS STRAIGHT

Reviewing last year's performance establishes the baseline that makes new targets credible. Revenue trends, margins, customer acquisition costs, and cash position tell the story of what actually happened versus what was assumed. Absent that grounding, new targets are aspirational at best and misleading at worst. The discipline is understanding which numbers drive outcomes rather than which ones are easiest to report.

Take Action

Use this checklist once at the start of the year, and every decision that follows gets easier.

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ALIGN YOUR TEAM'S ROLES

Alignment is the state in which every team member understands not only what the priorities are but also how their specific work connects to them and who owns what. Misalignment compounds. Different interpretations of the same goal create problems that surface months later as duplicated effort, missed handoffs, and relitigated decisions. Establish ownership and expectations early, before execution is already underway.

FIX OPERATIONAL FRICTION

Inefficiencies that are manageable at low volume become hard constraints as execution accelerates. The start of the year is the window to address them, such as by streamlining tools, clarifying workflows, and eliminating redundant steps. This is capacity creation before it is needed, which is far less expensive than trying to fix operational drag while a quarter is already in motion.

SET THE CADENCE

Sustained performance depends on cadence. Weekly check-ins, regular metric reviews, and defined adjustment points keep the business connected to its priorities as conditions change. This operating rhythm replaces urgency with discipline. Progress compounds when the system runs consistently. ■

LEADING THE FOOD BANK CHARGE

INTERVIEW WITH **AMY BEROS** / WRITTEN BY **MATTHEW BRADY**
PHOTOGRAPHY COURTESY OF **THE FOOD BANK OF CENTRAL AND EASTERN NORTH CAROLINA**

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Amy Beros, president and CEO of the Food Bank of Central and Eastern North Carolina, reveals what it takes to continually serve the needs of the community.

Q Have you always had a passion for helping people?

It's actually part of my earliest memories. When I was growing up in South Carolina, a family friend's husband passed away. She was a stay-at-home mom and suddenly couldn't pay bills or put food on the table, so the community rallied around her. When she was able, she started an organization that helped others who were struggling to make ends meet.

My family always volunteered and raised money with grassroots events like classic car shows, cake raffles, and food distributions. After I graduated from college and moved across the country, I always found ways to stay involved in helping others. I previously worked in the financial banking sector, though, which is very different from food banking. I felt pulled to the latter and transitioned into nonprofit work about sixteen years ago. I have been working professionally in hunger relief for about twelve years now.

Q How helpful was your background for that transition?

Very, especially in the past few years. People often think of nonprofits differently from corporations because of the mission, but 501(c)(3) is simply our tax status. If we're not making decisions like a business, we won't be here for the long term.

Q Approximately how many people do you serve, and how much food do you distribute?

We provide nearly one hundred million pounds of food each year to over 600,000 individuals. One in seven people in the thirty-four counties we serve, including one in five children, are food insecure, meaning they're not sure where their next meal will come from. That's unacceptable in a country like ours. It takes tremendous resources to meet that need, and, unfortunately, the demand continues to grow.

Q What strategies have you implemented to meet that demand?

We are one of the ten largest nonprofits in the country when measured by the value of the food we distribute. Alongside donations and charitable gifts, we also receive government support. Because of the scale, we have to make business decisions, often tough ones. We have eliminated some programs so we can focus more on immediate needs, for example. Our 2030 strategic plan focuses on a culture of doing better rather than doing more. That means using data to guide our decisions and ensuring that our neighbors help shape our strategies through ongoing feedback from the community.

We are also investing deeply in agricultural partnerships, including farmers who grow specifically for our food bank. One in North Carolina alone has three hundred acres dedicated exclusively to it. That allows us to help determine what is grown so we can fill the gaps that donated products might not cover.

Q Is access to such a large farm unusual for a food bank?

It is, but I think it is something we'll see more of in the future. We certainly plan to keep investing in that area. In 2025, we lost out on the equivalent of about $7 million in direct food donations, along with around $5 million in government investment and several truckloads of food.

Because of that, we are thinking about how neighbors support neighbors. We're looking closely at strengthening local food systems, growing philanthropy, and increasing advocacy and public policy work. There is also a real opportunity to partner with the business community on these issues.

What are some other drivers of food insecurity?

Access is a major factor—to resources and opportunity. Housing costs, childcare, healthcare, and grocery prices all contribute. Many families are just one emergency away, such as a missed paycheck, a broken car, or an appliance that needs replacing, from needing help.

For instance, I received an email from a father who worked at a federal prison. He told me he had never asked for help before, but after missing two paychecks he didn't know how he would feed his five children. Situations like that highlight how quickly people can find themselves needing support.

Would you elaborate on your mission statement?

Our core mission remains the same: Hunger is unacceptable in our community. What has changed is how food banks operate. Years ago, people pictured warehouses filled with canned goods. Today, the model is very different. In 2025, about 63 percent of the food we distributed was fresh produce, protein, dairy, and eggs. The goal is not just providing calories but providing healthy calories.

We also invest in nutrition education. Our staff includes nutritionists who create recipes using foods people might receive from food banks or partner pantries. They conduct demonstrations and help families learn how to prepare those foods. We also focus on chronic disease prevention because food truly functions as medicine.

That idea has led to partnerships with healthcare providers. We work with about eighteen of them and sometimes use food as part of a medical prescription approach. These programs help address both hunger and health outcomes.

How important are partnerships to your efforts?

They are essential. Simply put, we do not open our doors without them. It takes about seven hundred partner organizations working directly with neighbors. It also takes thousands of business partners who support us through donations, food contributions, and volunteer hours.

Each year, around 60,000 volunteers help us operate by sorting food, packaging it, and helping prepare distributions. If volunteers don't show up, the food does not move into the community. That makes volunteer engagement truly business-critical for us.

Logistics must be extremely complicated with so many counties involved.

Food banks are essentially large logistics organizations. Unlike many industries, however, we often work with incomplete information. Donations arrive unpredictably, and we don't always know what types of food will arrive or when. At the same time, we must distribute those foods quickly because many are perishable.

Each of the counties we serve has different needs. Some areas are urban, while others are extremely rural. We use a fair-share model that distributes food based on food-insecurity rates so that rural areas receive equitable access rather than resources flowing only to major population centers.

How much do donations fluctuate throughout the year?

Like many nonprofits, we receive about 40 percent of our annual revenue during the holiday season. Yet summer is when demand is highest because children are not receiving meals at school. That means we must carefully plan inventory and finances months in advance.

In your experience, do nonprofits compete for funding?

Fifteen years ago, I might have said yes. Today, I think about it differently. Our partner organizations rely on us for some resources but not all. If they don't receive support from their own communities, they cannot stay open. We are only as strong as the partner network around us.

In fact, instead of competing with one another, several large partner organizations in Durham formed a coalition to fundraise together for hunger relief called End Hunger Durham. That type of collaboration may represent the future of nonprofit fundraising.

You also respond to disasters. How does that affect your operations?

Disaster response is a major responsibility. What used to be seasonal—such as hurricane season—now feels year-round across the country. We maintain a reserve fund specifically for disaster response so we can act immediately when communities need help.

In Wilmington, for example, we operate a commercial kitchen designed to support disaster relief. It can function as a twenty-four-hour response center, providing prepared meals during emergencies. We also partner with organizations such as World Central Kitchen during large-scale disasters.

Would you share any stories that illustrate the impact of your work?

The farmer partner who has three hundred acres dedicated to our food bank told our board that working with us gave new purpose to his farming. He even said his family farm might not have survived without the partnership.

Another experience involved a grandmother raising her two teenage grandchildren after her son passed away. She received vouchers through a farmers market nutrition program and was so excited to take her grandchildren to choose fresh produce together. Moments like that remind us why the work matters.

What do people in your community say they need most?

Our strategic plan reflects four major themes we hear consistently. First is equitable access, especially in rural areas. Second is dignity. People want respectful treatment when asking for help. Third is healthier food, particularly fresh produce and protein. Surveys show that more than 80 percent of respondents want fresh food such as produce, eggs, and protein. And the fourth is advocacy to address policy issues that influence hunger.

What one misconception about hunger do you wish people understood better?

One of the most frustrating misconceptions is that people who need food assistance are unwilling to work. In reality, many use food banks only occasionally during difficult months. Hunger often results from unexpected circumstances, such as medical bills, job loss, or family emergencies.

When we say one in seven people experience food insecurity, those individuals may be your neighbors, coworkers, or parents of children in your child's classroom. Hunger is often invisible because people feel stigma about asking for help.

How can business leaders support food banks?

Volunteering is incredibly valuable. Businesses can organize team volunteer days or offer employees paid time to volunteer. Advocacy also matters—business leaders can help raise awareness about the connections between food security, public health, and economic stability. And businesses can share their expertise with nonprofits to help strengthen operations and strategy. ■

For more info, visit **foodbankcenc.org**

The Perks and Potential of Seasonal Email Marketing

Breaking up uninspired outreach with intriguing, timely elements can better captivate your audience and sustain their engagement for the months ahead—so you can avoid getting lost in crowded inboxes.

BY **ANDRE RIOS**

AS TIME GOES BY, IT'S not just our schedules and events that help us stay tethered to the moment. Cultural touchstones like major holidays and fluctuations in weather also help us clearly distinguish jolly and chilly December from sunny and sporty July.

The same rings true for your audience, who are not only looking for more sources of enjoyment throughout the year but also feeling inundated with digital marketing monotony that they rarely absorb before scrolling past it or swiping it into the trash.

As an antidote to readers' drifting attention spans, consider giving your marketing a touch of seasonal excitement.

A refresher

If you want to plan effective seasonal email campaigns, first revisit the evergreen essentials of good email outreach. According to email marketing company MailerLite, some of the best general practices across industries include:

1. To increase your open rates, send emails with subject lines of twenty to forty characters, craft segmented campaigns, and use emojis.
2. For a higher click rate, add prominent buttons and links directing them to resources like blogs.
3. Limit your unsubscribes by writing content that's relevant to your target audience's interests and needs, and make sure the subject line accurately reflects the content of the email.

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As you build your campaigns accordingly, keep a close eye on essential metrics, especially if you test altering your content throughout the year. Data like open and click-through rates will provide feedback on how successful each promotion is and what may require fine-tuning.

The power of a seasonal touch

While emails that follow best practices are likely to hook some audience engagement, there are numerous reasons why you should imbue your marketing with a seasonal focus, whether it's for a major holiday like Christmas or notable days like the spring equinox or Mother's Day.

An excuse to reach out

Every month has something distinct about it, whether that's a much-anticipated holiday, popular community event, or change of season. Consider these calendar highlights as opportunities to email your contacts more often, peppering in themed promotions so you can pique their interest in a certain product or service.

Moreover, you can take this opportunity to cross-sell or upsell during popular shopping occasions like back to school and Black Friday. And don't forget the power of simply saying hello. Sending general greeting emails with themed content and imagery that wish your contacts a happy new year, for example, can paint your business in a more positive, endearing light and keep you top of mind with your contacts.

Avoid the trash bin

If your audience begins to find your messaging repetitive, they'll quickly lose interest in it—and they may even opt to unsubscribe from your outreach if they perceive it as inbox clutter. Giving your emails seasonal variety helps keep your messaging from getting stale.

Alternatively, when you send your audience timely, themed emails with verbiage and graphics to match, they may feel more eager to read them. It's crucial to any campaign that you maximize opens, click-throughs, and the time spent reading, and leveraging familiar holidays and events can help sustain your recipients' interest.

Segment your audience

Moreover, seasonal emails offer another approach to segmentation. Use them to capture certain targeted reader categories' excitement over anticipated holidays and events.

Timely content in action

Consider the following seasonal subject lines. How can they help you tailor your outreach to your organization's industry and unique branding?

"Dive into cool summer vibes! 😎"

"New ways to fund your end of summer fun ☀️"

Send a summer email that features one of these seasonal subject lines, and fill it with fun outdoor sports images. Then write brief yet engaging copy that orients your unique selling proposition (USP) toward prevailing interests at this time, including travel, children being home from school, and hot temperatures. (See more about augmenting your USP on p. 36.)

A financial service, for example, might craft topical text like, "Reach out for assistance saving up for your next big vacation. Because the most valuable thing you can make this summer is memories. Click here to schedule your consultation." Such outreach could be far more appealing to readers than a generic evergreen pitch.

Investing accordingly

Naturally, adjusting your emails throughout the year may require a greater time investment from you or your marketing team. But you don't need to handcraft a different email for each month. Email marketing companies like MailerLite and Mailchimp can help you create automated campaigns that vary throughout the year. Whether you invest more time or money into such a tactic, taking this approach could pay off in more recipients reading your emails with genuine engagement—and becoming converted or repeat customers. ■

When you send your audience timely, themed emails with verbiage and graphics to match, they may feel more eager to read them.

MONKEY BUSINESS/STOCK.ADOBE.COM

Take Action

Review your current email marketing strategies with your marketing team or outsourced service, and devise messages with more seasonal language.

ACRONYMS IN ACTION

Marketing data promises clarity but routinely delivers noise. Most operators learn what the metrics mean without ever understanding the decisions those metrics are intended to inform.

BY **MICHAEL RUSSELL**

THE PROBLEM WITH MARKETING acronyms is that they get introduced as definitions and applied inconsistently across campaigns without a clear sense of how they connect to each other or to the business outcomes that actually matter. The result is a team that can report the numbers but struggles to act on them. Data gets presented and execution continues largely unchanged.

The fix is a different frame. Every marketing metric is a diagnostic tool, and each one answers a specific question about where a campaign is working. Understanding them in that order (question first, metric second) changes how they get used.

Let's discuss four common ones that you're likely to see.

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1 CPA

THE CONVERSION REALITY CHECK

Cost per acquisition (CPA) is where marketing performance connects directly to business viability. It measures the total cost required to convert a prospect into a customer. It must be evaluated against the revenue or margin a customer generates. If the CPA exceeds the value of the customer, the campaign is consuming more than it produces.

CPA is also the metric most sensitive to what happens after the click. A campaign with high CPA almost always has a conversion problem: a disconnect between what the ad promised and what the landing page or sales process delivers. Fixing CPA without examining that gap is an exercise in adjusting spend rather than solving the actual problem.

JESSE B/PEOPLEIMAGES.COM/STOCK.ADOBE.COM

2 CPC

WHAT ATTENTION ACTUALLY COSTS

Cost per click (CPC) measures how much is being paid for each engagement. It is shaped by competition, audience targeting, platform dynamics, and the quality score the platform assigns to the ad. A low CPC isn't inherently good, and a high CPC might not be bad. The number only becomes meaningful when compared against what those clicks produce downstream.

A campaign generating clicks at a low CPC but failing to convert is a cheap traffic problem, not a cost efficiency win. CPC describes the economics of attention. It says nothing about the economics of the business. That requires the next metric.

3 CTR

THE ATTENTION FILTER

This answers the question, "Is the message earning attention?" Click-through rate (CTR) measures the percentage of people who saw an ad and chose to engage with it. A high CTR signals that the message is relevant and the creative is doing its job. A low CTR signals the opposite: that the audience, the message, or the placement is misaligned.

CTR is the top of the diagnostic chain. When it is low, everything downstream suffers regardless of how strong the landing experience is. But a high CTR isn't a success signal on its own. It confirms that the first filter, attention, has been passed. What happens next is where the more consequential metrics begin.

4 ROI

THE ONLY METRIC THAT ANSWERS THE BUSINESS QUESTION

Return on investment translates marketing activity into a commercial outcome. It answers the question every operator ultimately needs answered: Is this worth doing? A positive ROI means the campaign is generating more value than it costs. A negative ROI means it is not, regardless of what the other metrics suggest.

ROI is the final check, but it is a lagging indicator. By the time ROI deteriorates, the contributing failures, such as weak CTR, high CPC, or poor conversion, have already been present for weeks. This is why the earlier metrics matter. They provide advance signals that allow course correction before the ROI damage compounds.

MARKETING DATA DOES NOT PRODUCE CLARITY BY EXISTING. IT PRODUCES CLARITY WHEN CONNECTED TO SPECIFIC DECISIONS AND REVIEWED WITH ENOUGH FREQUENCY TO ACT ON THEM BEFORE THE WINDOW CLOSES.

> How the metrics connect as a system

The four metrics form a diagnostic chain, and each failure mode points to a different intervention. Low CTR indicates a message or audience problem; the solution is a creative or targeting adjustment, not a budget increase. High CPC with acceptable conversion may simply reflect competitive market conditions and require a margin-based judgment about whether the economics still work. High CPA with strong CTR points to the post-click experience: the landing page, the offer, or the sales handoff. Negative ROI with acceptable CPA suggests a customer value problem—the right acquisition cost for the wrong customer.

Reading these metrics in sequence rather than in isolation is what separates operators who manage campaigns from operators who are managed by them.

> The discipline of fewer metrics

The practical failure is tracking too many simultaneously. Impressions, reach, engagement rate, and frequency are easy to generate and easy to report, but most are disconnected from commercial outcomes. They measure visibility, not performance.

A tighter approach (CTR, CPC, CPA, and ROI, reviewed weekly against defined targets) creates a shorter feedback loop and forces clearer decisions. When CPA rises two weeks running, that is a pattern requiring a response. When ROI is negative at the current CPC, that is a business decision about whether to continue, adjust, or stop.

Marketing data does not produce clarity by existing. It produces clarity when connected to specific decisions and reviewed with enough frequency to act on them before the window closes. ■

Take Action

Master these metrics before your next campaign review and you'll spend less time reporting and more time deciding.

Why Momentum Stalls

Most organizations treat slowing performance as a motivation problem when it is almost always a systems problem. The interventions that work look nothing like the ones most leadership teams instinctively reach for. BY **THOMAS MAYE**

FORWARD MOTION LEAKS. The organizations that lose it rarely experience a single catastrophic failure. They accumulate small breakdowns: a decision left unresolved, a priority that shifted without being communicated, or a team executing on last quarter's playbook because no one updated it. By the time the slowdown appears in the numbers, the root cause can be months old.

This matters because the diagnosis determines the intervention. Leadership teams that frame momentum loss as a motivation problem respond with rallying communications and renewed commitments to excellence. None of that addresses the actual failure, which is almost always operational: unclear ownership, lagging feedback loops, or a planning cadence that cannot absorb new information fast enough to stay relevant.

Sustained execution depends on continuity. Work builds on itself, but only when the conditions for the next action are being created by the last one. Sporadic intensity breaks this logic. A team that operates at full capacity for six weeks, then stalls through a period of ambiguity, does not get credit for the six good weeks. The stall resets the clock.

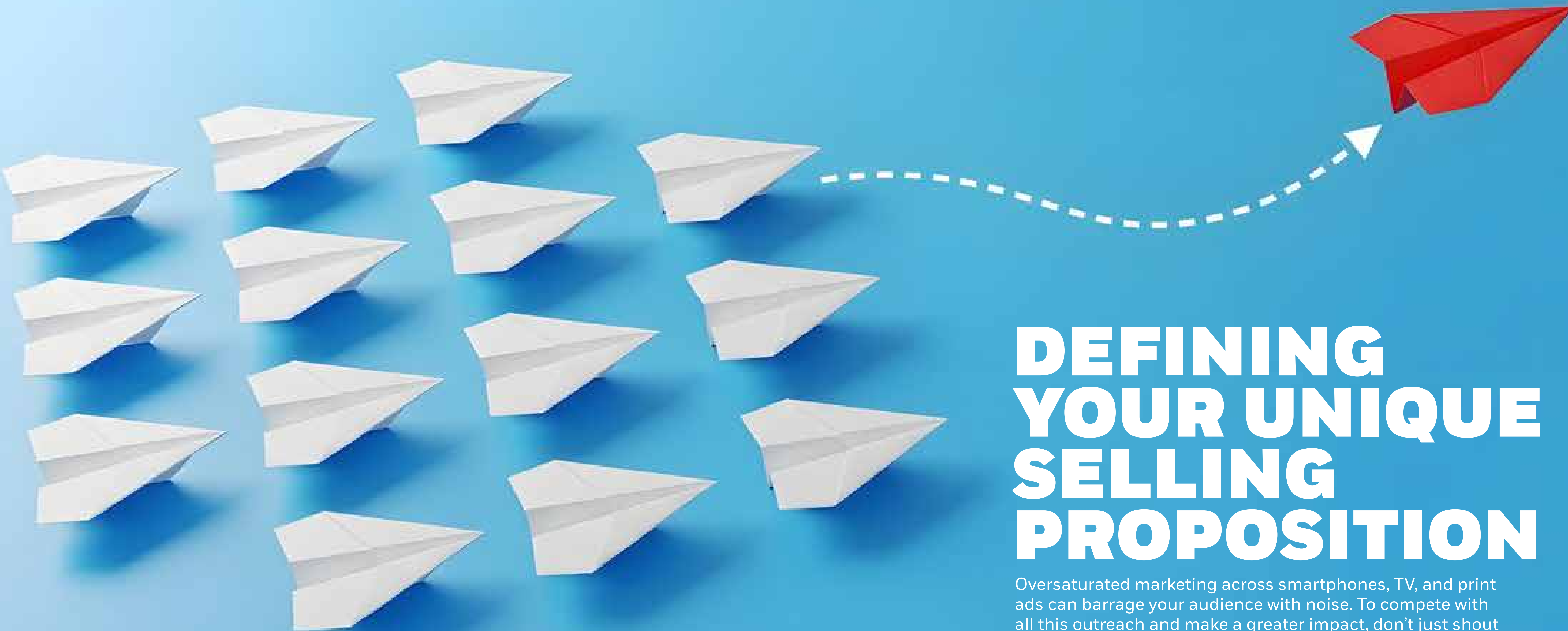
Execution friction tends to concentrate in three places: ownership ambiguity, where unclear accountability defaults to inaction; measurement lag, where teams learn how they performed too late to course-correct; and priority drift, where direction shifts at the leadership level while the team below keeps executing on the previous version. Each is a systems failure rather than a people one, and each requires a real fix, not exhortation.

The organizations that sustain momentum longest are not the ones working hardest in bursts. They are the ones that have made consistency easy to maintain and treat every stall not as a motivation problem but as a diagnostic signal worth taking seriously. ■

PATPITCHAYA/STOCK.ADOBE.COM

Take Action

Consider this forward-thinking mindset before the slowdown reaches your numbers.



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DEFINING YOUR UNIQUE SELLING PROPOSITION

Oversaturated marketing across smartphones, TV, and print ads can barrage your audience with noise. To compete with all this outreach and make a greater impact, don't just shout louder; feature your USP to speak with greater clarity.

BY **ANDRE RIOS**

Unique selling proposition (USP): (*noun*) The distinct advantage that makes your business superior to its competitors and highly relevant to your specific target audience.

Identifying a USP is more than just a branding exercise. It is a mechanical necessity for any business that transitions from chasing cold leads to building a sustainable, relationship-based enterprise. Try these foundational strategies for defining your company's distinct value, and you could shift the perception of your business from an ordinary commodity to a trusted forerunner in your industry.

The mass appeal myth

Many professionals operate under the assumption that they must be everything to everyone, possibly fearing that a narrow focus will exclude potential clients. Wouldn't gearing a retail shop to outdoors enthusiasts, for example, turn away urbanites? However, failing to define a specific identity often results in a marketing strategy that feels unfocused and maybe even ineffective. If you want to maximize your potential, you need to sharpen your edge through the power of a clear USP.

Take Nike's USP, which you could label as reliable athletic wear that offers superior comfort, performance, and results.

While many people confuse a value proposition with a USP, the former simply concerns how you solve your clients' needs or wishes without a necessarily competitive focus. The latter, meanwhile, explains what makes your brand greater than and distinct from other brands. If you establish a clear USP, you can avoid being merely another name on a crowded avenue or a sea of social media posts among competitors—and can instead become a resource that your target audience will see as *uniquely poised* to satisfy their requests.

> Start by identifying who you serve and write up a customer profile describing them. From there, consider how you offer the best possible solution to your audience's needs and what ultimately makes buying from you a prudent choice.

MASQUE/STOCK.ADOBE.COM

DELCIO FERNANDES/PEOPLEIMAGES.COM/STOCK.ADOBE.COM

A step-by-step approach

Take the following steps to shape your USP and help make it definable across your branding, consumer outreach, customer service, and other marketing efforts.

Be audience-focused
Start by identifying who you serve and write up a customer profile describing them. From there, consider how you offer the best possible solution to your audience's needs and what ultimately makes buying from you a prudent choice.

Be reflective
To determine what leaves a strong impression on your clients, sift through customer reviews and ask for direct feedback. Why did they choose you, and what did they most enjoy about their experience?

Be a trailblazer
Research your competitors to determine how you can outcompete them and the

features that best differentiate you. This investigation phase can offer clever approaches to your USP.

Be bold

Assert what you genuinely think makes your brand superior, whether it's pricing, product quality, delivery times, etc. (These aren't USPs, as they aren't unique, but they are solid features from which to shape this statement.)

Be creative

Refine these features with what makes your brand matchless. Consider how you take a distinct approach to service, use superior materials, or innovate in your field. Surely you aren't just a photocopy of your competitor, so how do you differ?

Be realistic

Avoid making claims that you can't back up with results. For example, don't promise the fastest deliveries or turnaround times if this is untrue. Your USP will set client expectations, so be sure that you can meet them.

Be clear

Write down a rough version of your USP, then share it with other leaders in your organization or even broadcast it throughout your staff. Welcome feedback on what your company's true unique selling proposition is.

Be considerate

Solidifying your USP requires a customer focus, not an owner one. If you simply concentrate on your own personal or internal business goals, like revenue, you won't approach the statement from the right perspective.

As you craft this promotional statement, ruminate on consumer pain points relevant to your industry (e.g., slow delivery times, budget limitations, or time limitations) and how you find creative ways to resolve them.

Look to your successes

As another route for defining or refining your USP, refer to your prior achievements, such as successful products or campaigns that captured a strong audience response. Identify the specific "how-to" behind your biggest wins, and turn it into your actionable playbook.

Then ask yourself questions like: "How do we help keep our clients clued in to product updates or industry news?" and "Do we use a unique voice on our socials?" Identify the posts that produced the best engagement, including likes, shares, and positive comments, and strategize how you could lean into that post type or tone. Your USP should directly affect how you perform outreach, but if you're having trouble defining this statement, try reverse engineering it based on the persona clients seem to gravitate toward.

NDABCREATIVITY/STOCK.ADOBE.COM

> As another route for defining or refining your USP, refer to your prior achievements, such as successful products or campaigns that captured a strong audience response. Identify the specific "how-to" behind your biggest wins, and turn it into your actionable playbook.

Execute yours

Here are some insights about leading a business to make your USP part of its daily practices.

Place the client first

One of the most effective ways to differentiate yourself is to adopt a "serve first" philosophy. If relationships are the foundation of your business, your USP should focus less on flashy tactics and more on these timeless fundamentals:

- Your first job is to make people feel good, not just secure their business.
- When you lead with service, you create value instead of simply creating outreach noise.
- Providing value first builds trust and makes your future marketing feel more welcome to your audience.

By serving first, you grow your reputation and your brand identity simultaneously.

Set expectations, then exceed them

A great USP is only as good as the system that delivers it. To move beyond theory and make your statement clear in practice, you must implement product quality standards that turn your unique value into predictable outcomes.

Taking the example of Nike again, the brand's distinct footwear for different purposes (walking, basketball, cross-training, etc.) aims to help you find the right shoe to improve your performance in your intended activity. Their customers clearly understand that Nike shoes aren't just ordinary athletic shoes—they're tools for enjoying recreational and fitness activities to their fullest.

As you shape your daily business practices and marketing efforts, utilizing a USP helps you move intentionally by spotlighting what your organization does best. And remember: a USP is not set in stone. When the market shifts, you innovate in your field, or you rebrand, treat this statement as a living component of your business that you can rework accordingly. ■

Take Action

Identify the unique value in your organization, and explore ways you can optimize this identity across your marketing and services.

PRODUCTIVITY

Creating Winning Workflows

Inefficient processes drain time, delay output, and reduce team motivation, but streamlining them can restore clarity and operational momentum.

BY **MATTHEW BRADY**

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THE DREADED WORK commute is associated with stop-and-go traffic, frayed nerves, and the occasional blaring horn. Your team may feel similar frustrations when it comes to their workflows: What should be a smooth journey can get quickly bogged down and become inefficient. However, when you identify the reasons for the delays and take steps to eliminate them, you can provide a clear road map for completing their work more efficiently.

How it happens

Workflow problems are often caused by repetition. For instance, a task can enter through email, get copied into a project tool, and then get discussed again in a meeting. Each step adds time without improving the outcome. This duplication creates confusion about the current version of work. Teams may reference outdated documents or incomplete updates because information lives in multiple places. As a result, decisions slow down, and errors increase.

Another source of friction appears in unclear handoffs. When one role completes a task, the next step may not be defined. Work sits idle for hours or days because no one owns it. These delays rarely appear in reports, but they accumulate.

Once you understand the primary sources of your company's process congestion, you can formulate steps for clearing it out.

Test your current system

One useful place to start is by mapping your workflow as it actually happens—not how it's "supposed" to happen. When you lay out the steps in a typical day or process, patterns can emerge. Things like repeated tasks and unnecessary approvals tend to hide in the gaps between steps, so this kind of visibility is often where the biggest insights come from.

TINA/STOCK.ADOBE.COM

When too many platforms are in play—email, Slack, project tools, shared docs—noise tends to build quickly.

MALAMBO C/PEOPLEIMAGES.COM/STOCK.ADOBE.COM

Eliminate dead weight

From there, it helps to take a closer look at low-value tasks. Ask a simple but revealing question: "If we stopped doing this, would anything break?" In many cases, the answer exposes work that continues out of habit rather than necessity. Common examples include reports no one reads, meetings without clear outcomes, and manual tasks that no longer serve a real purpose.

Set the standard

As those inefficiencies become clearer, standardizing repeatable processes becomes much easier—and much more impactful. When something is done more than once, having a simple, documented process reduces decision fatigue and keeps people from repeatedly reinventing the wheel. Over time, that consistency sets expectations across your team.

Reduce clutter

It's also worth paying attention to how tools and communication are structured. Too many platforms—email, Slack, project tools, shared docs—can create unnecessary noise. Defining where specific types of work happen and sticking to those boundaries helps cut through that clutter and makes collaboration feel more intuitive.

A surprising amount of discontent comes from unnecessary or unfocused meetings, so tightening them up—cutting what isn't needed, shortening what remains, and ensuring each one has a clear purpose—can have an immediate impact.

Batch similar work for focus

Another often-overlooked area is how work is grouped throughout the day. Constantly switching between tasks can drain focus, so pairing similar types of work—whether it's meetings, deep work, admin tasks, or communication—allows for longer stretches of concentration and more meaningful progress.

Clarify daily priorities

At the same time, prioritizing duties is critical in keeping workflows manageable. Instead of treating everything as urgent, narrowing the focus to two or three "must-win" tasks each day gives people a clearer sense of direction. When priorities are defined, it becomes much easier to ignore the surrounding noise.

Improve meeting efficiency

Meetings deserve a closer look as well. A surprising amount of discontent comes from unnecessary or unfocused meetings, so tightening them up—cutting what isn't needed, shortening what remains, and ensuring each one has a clear purpose—can have an immediate impact.

Automate where possible

You should also look for opportunities to automate recurring work. Emails, reports, onboarding steps, and follow-ups are often repeated in similar ways, and turning them into standardized naming conventions, folder structures, and response templates not only saves time but also reduces the likelihood of errors.

AI tools can also support workflow clarity when applied to specific tasks. Their value comes from reducing repetitive actions, not replacing judgment. For example, AI can turn a long email thread or meeting transcript into a concise summary with action items. In addition, it can draft routine content and categorize messages based on content. The key is using AI to replace a specific, repetitive step rather than unintentionally adding a new layer.

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Conduct reviews

Finally, building in a short weekly review helps keep everything on track. Setting aside even fifteen to thirty minutes to ask what slowed things down—and what can be simplified or removed—creates a feedback loop that keeps work from becoming cluttered again over time.

Unlike frustratingly unavoidable morning and evening commutes, you have complete control over your company's workflows—and, by extension, how they impact your team's efficiency and morale. Consider these decluttering steps, and see how they can take your processes from problematic to pristine.

Take Action

Try implementing at least two or three of these suggestions over the coming weeks.

PRODUCTIVITY

Staying on Track and Adapting Fast

Most teams are working with more data than they need and less clarity than they think. BY **THOMAS MAYE**

If you can't see your team's performance clearly, you can't manage it. Most operators are working from instinct, scattered updates, or reports that arrive too late to change anything. A simple scorecard fixes this by eliminating everything that doesn't directly reflect progress against your current priorities.

(>) Choose metrics that define "good"

Start with selection. Pick the metrics that most directly connect to your primary goals, such as revenue generated, pipelines created, conversion rate, output volume, and retention. For each one, set a specific weekly target. A metric without a target is just a number. The target is what establishes a standard you can actually manage against.

Resist the pull toward comprehensiveness. A dashboard that tracks twenty things tells you everything is happening and nothing about what matters.

(>) Track actions

Outcomes lag. Revenue this week reflects activity from three weeks ago. If you only track results, you're always reading yesterday's news.

Add a short list of leading indicators, such as calls made, proposals sent, or meetings held, that predict future outcomes. When those numbers drop, you have advance warning before the results reflect it. That gap between signal and consequence is where intervention is still cheap.

(>) Review weekly without exception

A scorecard reviewed monthly is a historical document. Reviewed weekly, it becomes a management tool. Keep the check-in short and structured around three criteria: what progressed, what stalled, and what needs to change before next week. This cadence prevents drift, surfaces problems early, and keeps priorities from quietly becoming aspirations.

When a metric slips two weeks in a row, that is a pattern. And patterns require a decision, not a note to watch it more closely. ■

Take Action

Build the scorecard your team actually reviews and start managing from signal, not memory.

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Front of Tear Out Card 2

Business Insights from the Animal Kingdom

Looking for ways to improve your business? Here are three nature-inspired strategies to help you cultivate success in your workplace.

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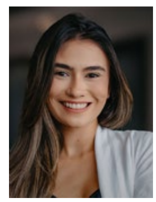

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Back of Tear Out Card 2

THINK LIKE A BEE

Bees are masters of collaboration, and hives thrive because of their collective effort and efficient communication. Follow their lead, encouraging open dialogue and honest communication within your team to create a productive, harmonious work environment.

HUNT LIKE A LION

Hawks, lions, and other predators showcase the immense power of focus: they pick their targets and approach with patience and precision, increasing their chances of success. Similarly, set clear, ambitious goals aligned with your company's vision and equip your employees with the training and resources they need to excel.

ADAPT LIKE A CHAMELEON

Chameleons are renowned for their ability to adapt to their surroundings, changing color to blend into the background in order to evade threats. Likewise, always encourage flexibility and innovation within your team so they can better respond to market changes and seize new opportunities.

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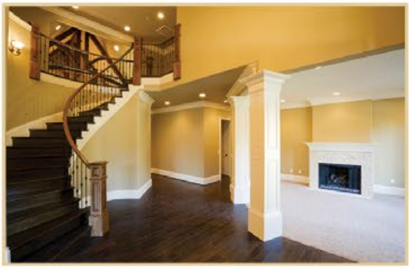

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