

# **BUSINESS & HR**

## *Aligning practices for growth*

*Common challenges, scalable processes, and  
other strategies for success.*



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## **SAM NEWBY & TRISTIN MAY**

More than sharing specifics of what we do, that then have to be contextualized, we want to transfer what we've learned about the thought process that transcends each phase of growth. 200, 2000, and today.

**1**

### **IDENTIFY | How do you know you need a process?**

- If you're making the same decisions over & over inconsistently
- If deadlines are being missed, frustration is growing with key stakeholders
- Consistent questions about a current process mean it's time to renew or clarify it.
- If your current systems create undesirable outcomes
- If you're not able to scale for growth

## **ACTION ITEM**

**Evaluate what areas may need infrastructure of process due to indicators.**

**Pick one area of focus this year and focus on how you can BUILD a process or infrastructure to solve the problem.**

**2****BUILD | How do you build something to solve the right problem you're experiencing?**

- Keep the target in mind.
- Don't overengineer.
- Learn from organizations further along then adapt to your environment.
- Understand timing.
- Gauge your team.
- Go one phase at a time.

**3****IMPLEMENT | How do you roll out a new process successfully?**

- 1) Senior Leadership Buy-In
- 2) Communication
- 3) Training
- 4) Support
- 5) Reinforcement

| <b>AREA</b>                    | <b>PHASE I</b>                                     | <b>PHASE II</b>                                       | <b>PHASE III</b>   |
|--------------------------------|--|---|--|
| <b>JOB DESCRIPTIONS</b>        | Create a template                                  | Go through outlining current teams duties             | Implement early in the recruiting + hiring process         |
| <b>BUDGETS</b>                 | Build a budget with guardrails (not a deficit)     | Go through a clear process to set annually            | Forecasting  |
| <b>INTERNAL CONTROLS</b>       | Identify how to segregate duties                   | Test controls   | Implement + do not deviate                                 |
| <b>PERFORMANCE EVALUATIONS</b> | Identify the areas you want performance measured   | Build an evaluation template that works for your team | Build the review process to implement                      |
| <b>RECURRING 1:1's</b>         | Start 1:1's with your team on a recurring basis    | Encourage your managers to conduct 1:1's              | Measure the success of this in the annual evaluation cycle |
| <b>CONTRACT NEGOTIATIONS</b>   | Compile all annual contracts together in one place | Create a process around contract approvals            | Annually review and audit contract language                |

**CONTACT US**

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