



# SMALL BUSINESS SUCCESS

*White Horse Plains*

Community Futures Development Corporation



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## Finding Clarity

### Clearly Seeing Your Path To Success

**M**anagement guru Brian Tracy says "the three keys to high achievement are, clarity, clarity, and clarity." He goes on to say "your success in life will be largely determined by how clear you are about what it is you really, really want." When you first start up a business, it's easy to have clarity. Most of us get busy writing a business plan, forecasting sales and revenue, planning marketing and sales strategies, and feel we know exactly where we're going and how we'll get there. Once you've achieved those initial goals and have been working in your business for a few years, it's easy to get more caught up in the day to day than in evaluating whether you're still on track with your original plan. It may be that you're still on exactly the same path you set out in your business plan. But it may also be that you've taken a few forks in the road, taken advantage of some opportunities you couldn't have anticipated, and find yourself on a completely different path. Regardless, you need to ask yourself whether you have clarity today, about your future from this point forward.

If you've been running your business in haphazard way - just waking up every morning and seeing what the day brings, it's critical that you take a step back and evaluate where it is you want to go, and whether the path you're on will take you there. Although we may all have had moments when that great "aha" hits us and we gain a new insight on some issue or problem, generally, clarity is not something that just happens. We need to be conscious about choosing to find it for ourselves, and for our businesses if we want to succeed. If you've been somewhat unconscious about where you're going, here are some ideas you might try to find that clarity for yourself and your business.

#### **Take uninterrupted time to reflect and evaluate**

I know, I know, time is the one thing you don't have to spare, but the truth is, clarity is most often found when all other distractions are set aside. Take a weekend away from home - find a place where you aren't tempted to be busy (this is not the time to be a tourist). A lakeside or mountain cabin, a quiet bed & breakfast, or even a visit to an understanding relative who will allow you the space that you need. Then think about your response to these questions:

- What did you want to accomplish when you started your business?



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- Are you there or has your path changed?
  - If so, are you where you want to be? If not, where do you want to be? Financially? With your relationships? With your business? With your personal and recreational life?
  - Are the same things important to you now, that were important when you started your business? Has anything shifted? Why?
  - What hasn't been working in your life or your business lately? Why hasn't it been working? Where do you need to make changes?
  - Where do you see yourself in 3 years? 5 years? 10 years?
  - What barriers do you see that may get in the way of being where you want to be? How can you address and overcome those barriers?
  - What do you want to be remembered for? Are you actively working towards accomplishing those things in your life now?
  - Where do you need to refocus, prioritize, change directions?

The answers to these questions will bring you closer to clarity for your life. They'll also probably initiate even more questions for reflection. Journal your answers, or at least jot down some notes so you have a concrete record of your thought process. Writing down your answers is as important as answering the questions. It gives you a record of your thoughts (you may want to access them at a later time), and there's something about the act of writing things down that increases your commitment to the process.

### **Seek the counsel of wise and truthful friends**

Notice I said wise "and truthful" friends. Seek out those you know will not sugarcoat the truth or tell you just what you want to hear. Find people you trust, and who know you well and ask them what they see in your life. Based on what they know of you, do they feel you're on the right track with your life and/or your business? Can they see areas in your life that aren't working, or are out of balance? Do they have visions for you that you may not have considered? What do they see as your strengths and weaknesses? The perspectives of others can help you find clarity in ways that you can't see yourself.

### **Set new goals**

Once you've answered these questions, walk away and give yourself some time. Go for a long walk, watch a football game, or have a nap. Once the fog in your head has cleared, reread your journal or the notes you took, and decide exactly which direction you want to take. Based on new priorities, a new vision of your future, or anything else your internal quest has revealed, how are you going to get where you want to go? It's time to set some goals. You've probably heard some version of this goal-setting acronym - SMART - that effective goals must be specific, measurable, attainable, relevant, and time-oriented, but are you using it? Set new goals for yourself, and put them to the test using those guidelines. Are they specific enough to guide you day by day? Can you measure them - how will you know when you've achieved them? Are they attainable - do they stretch you beyond your comfort zone while still being reachable? Are they relevant to your values and priorities in life? If not, you're not likely to follow through. And, are they attached to a timeline? Do you know when you want to have achieved those goals?

If you invest the time and energy to take a journey inward, you'll have a new and very clear roadmap for your journey. Getting where you want to go is all about knowing where that is, and planning how you're going to get there.

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# **Seeing Things from your Customers' Perspective**

# Using Secret Shoppers to Your Advantage

Everyone who runs a business knows how important it is to stay in touch with what customers want and need, and to deliver service that stands out from the rest. But just how do you get inside the experiences your customers are having with your business? One method is to use a customer survey. They provide excellent and direct feedback, but it can take a lot of time and energy trying to get them returned to you. Another method is to do a random telephone survey on what customers think of your service. This may or may not be appropriate depending on the kind of business you have. Another option is to use a secret shopper (or mystery shopper as they're sometimes called) to find out what the customer experience is like with your business. This is a highly underused strategy for retrieving information, but can be very effective for giving you feedback you can't get any other way.

## What is a secret shopper?

A secret shopper is someone you hire to come shop at your store or business. Depending on the kind of information you want, you tell the shopper how you want them to approach your business. If you want to know whether your staff is providing polite, helpful information over the telephone, ask your shopper to call and request information. If you want to know what kind of service your customers receive with they come into your business, give them a specific thing to shop for. When the shopper has completed their shopping assignment, they provide you with a report of their experience. This can be as simple as them writing a narrative of their experience, or filling out a form that you've designed addressing all the aspects you're interested in knowing about.

## Where can you find a secret shopper?

Look around you. Friends, family, competitors, your kids' parents, folks you volunteer with, people you play sports with. Anyone you know is a potential secret shopper (although it should be someone your staff doesn't know well) and most people would be glad to help you out. If you're not comfortable asking people you know, there are dozens of secret shopper companies on the web who can provide you with a list of people in your area who have signed up to be secret shoppers. The downside to doing this is that you can't set your own remuneration policy and often have to pay to register with these companies.

## How do I remunerate my secret shopper?

Some people like to pay a flat fee or hourly rate for a shopping experience and report. Think about how long the experience would take and how long it would take to prepare the kind of report you want. An hour? Two? Then offer the shopper what you feel is a fair hourly rate for that amount of work. Another way (which is sometimes more fun and often even more appealing for the shopper) is to give away some equivalent merchandise or service for the time spent. Are you an electronics shop? Give your shopper an MP3 player. Do you run a spa? Give away a facial or manicure. A window manufacturing company? How about a free replacement on a window in your shopper's home? You and your shopper can negotiate payment. Be as creative as you want. The more fun they have, the more likely they'll want to do it for you again.



## What do I tell my staff?

I wouldn't advocate ambushing your staff with the information after the fact. This doesn't inspire

loyalty and will make them suspicious of you in the future. I would recommend telling your staff that you are going to employ secret shoppers for the purpose of gathering customer-centred information. Let them know how many times you'll be doing it (4 times in the next year, 2 times in the next month) so that they can be aware, but won't necessarily be on guard. Let them know that even you don't know when these shopping excursions will happen so everyone is on even footing. Tell them that the information you gather will help you shape your customer service strategy for the future. That way, every person who calls or walks through your doors is the potential secret shopper. This alone will transform the way some of your staff perform customer service.

### **What do I do with the information?**

Once you've received the reports, analyze the data and come up with a strategy to implement better service where it's needed. Ask yourself if there are any patterns. Is there a difference between how people are treated on the phone or in person? Do people generally have to wait too long for service? Are your products or services priced competitively? Is shopping at your business a pleasant experience? Would people come back to shop again? Is your service consistent - do customers have the same experience every time they shop? You'll discover that there will be areas where you're doing things really well. Acknowledge those to your staff, build on them and reward them for it. You'll also discover areas where you need to get better. Have a meeting with your staff and brainstorm about what things can be implemented to improve the service you provide to customers. When you do it together, they'll take ownership of the decisions made and will implement new ideas and strategies enthusiastically. Make it a goal to measure your success. See if your staff has produced the desired results for the next round of secret shopping.

A secret shopper strategy can really impact your business because you are getting information straight from the customer experience. Using this tool as a way you and your staff can accurately assess how you're doing and make specific improvements will be an invaluable way to increase customer loyalty. You'll be well on your way to becoming a company that offers outstanding customer service.

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# **Making Minutes Matter**

## **12 Ways to Create More Time in Your Day**

**Time. Ask anyone what they wish they had just a little more of every day, and that's what they'll say. It's ironic that in an age where we have more time-saving gadgets than in any other time in history, we feel we have less time than ever before. Of course, it isn't true that we have less time. Hours are still clocking in at 24 every day, and each of those hours has 60 equal minutes. We have just as many daylight hours as we did hundreds of years ago, only now we have electricity to extend our productivity to beyond daylight hours. All of us make choices every day about how we use the hours that we've been given, and if we're living a balanced life, those choices should reflect our values and priorities. But most of us at some point, find ourselves wasting, or frittering away precious minutes in our day that added together, could have given us an extra hour to spend with our kids or family, to get badly needed exercise or to just increase our mental health by reading a great book or getting out the brushes and finishing that painting. Here are some tips on how to create minutes in your crazy, hectic day.**

1. **Make a "to do" list every day and review it often** - there's no way out of this one. Whether you're a list maker or not, you will be more productive if your daily tasks are clearly set out for you, and if you review and revise often according to how your day is going.

2. **Use your "spare" minutes wisely** - all of us have them - those minutes you spend in the bank lineup, waiting at your doctor's office, sitting in traffic or driving to and from appointments, all add up. Whenever you leave your office take things with you that you can do in ten minutes or less - that article you need to read, the staff evaluation you've been meaning to do, brainstorming that new marketing idea - make use of minutes that otherwise get wasted.
3. **Turn driving time into learning time** - most of us wish we had to spend less time in our cars, but you can turn that time into learning time. Always have motivational or educational tapes and CD's in your car so that driving and waiting time becomes learning time. You can take an entire course in your vehicle as you drive to and from meetings, soccer games and music lessons!
4. **Learn to say no and delegate** - you don't have to do it all, and learning what you can and can't do is vital to your productivity and your sanity. Delegate the things you can't do and learn to use the word NO more often.
5. **Use your natural work rhythms to your advantage** - recognize when your peak productivity hours are. Are you a morning person or are you most productive after dinner? Plan your most difficult tasks during your natural peak hours and you'll get more done in less time.
6. **Communicate your schedule to others** - so much time is wasted when someone else in your life schedules an appointment or activity at the same time as when you've got something already on your agenda. All kinds of time must then be spent in reorganizing, re-prioritizing, and rescheduling when a family calendar, or an office calendar could have eliminated that stress.
7. **Try to consistently get better sleep** - depriving yourself of a good night's rest to get something done is counterproductive. The time you saved the night before will actually have been robbed from the next day. Inadequate sleep will actually make you less productive the next day.
8. **Don't rush through tasks** - trying to get things done too quickly only means you'll probably have to redo it, or spend time fixing mistakes later. Taking a little extra time to do it well initially will be more efficient than time you'll spend redoing it the second time.
9. **Ask questions often** - if you don't know, don't spend hours trying to find out yourself when someone in the next office already has the answer.
10. **Don't rely on your memory** - write everything down. When someone asks you to pick up an extra package of paper while you're at the stationery store put it on your list (remember #1?). It will save you having to make another trip if you forget. If you meet someone at a meeting that you need to follow up with, jot it down in your daytimer. Make notes at meetings of things you need to do, and then schedule them into your day. With all the things you have to do in a day, your memory will fail you more often than not. Having things written down will save you hours trying to remember, or worse, recouping after you've forgotten to do them.
11. **Don't procrastinate** - (see the article on procrastination in this issue).
12. **Have a daily "quiet hour"** - this doesn't necessarily mean a literal hour, but a specific amount of time that you schedule every day to reflect on what you want to accomplish, review your values and priorities, and generate a calm strategy for your day. Many people find first thing in the morning a great time to do this, but I know of others who take their quiet break in the middle of the day, or in the evening before bed. A refocusing time each day will lead to better management of your time.



You may not be able to literally create more time in your day, but you can make your days more productive and less stressful by managing your time just a little better.

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# How to Create Dynamic Handouts

Whether it's a sales presentation, a networking meeting, a business introduction or a staff training session, 90% of your message will be forgotten 24 hours after your presentation. So how can you increase retention and the effectiveness of your presentation? By creating a professional handout package. The right handout package serves as an encore to your presentation. If you put a little extra work into having relevant content and a really professional-looking document, it will be something people are less likely to throw away. That way, whether it's a potential client or your own staff, they don't have to rely on their memory when they need to retrieve it.

For a client, it might look like this:

**Boss:** "We need to do some renovations in our office - anybody know someone who can do a good job of furniture construction?"

**Manager:** "You know, someone was in here last month and they did a presentation on that. As a matter of fact, I kept the documentation because it was so impressive. It's on my desk - let me go get it for you."

For a staff person, having that documentation might be just what they need when asked to do a new task or to implement a new system, so that they can do it successfully on their own. Here are some tips on how to create effective handouts that won't get tossed into the recycle bin.

1. **Have them professionally bound with a plastic cover.** This is especially important for external documents (those you use outside of your office). A cerlox binding costs very little and can be done quickly at your local stationery store. Not only does it make the package look like it's worth keeping, it's usually too much trouble to remove the paper from the plastic and the binding so people are more likely to file it than recycle it.
2. **Proofread, proofread, proofread.** Whether it's an internal or external document, your credibility is at stake. Make sure figures are accurate, there are no spelling or grammatical errors and that pages are not copied crooked. An official writing style guide is a good investment. Find one and use it!
3. **Your handout should be directly connected to your presentation.** People should be able to follow what you say, with what you've written. Extraneous information will just confuse people, and will make the document less useful to them when they want to retrieve the information they've heard in the presentation. If you have information that is not in your presentation, but that you feel is important for them to have, place it in an appendix or addendum rather than in the body of the presentation. Refer to it in a footnote in the appropriate section.
4. **Charts, graphs and diagrams have more impact than words.** When creating your presentation, think about where you can find charts and diagrams to support the content in your presentation.
5. **Engage your audience.** Provide a deliberate spot for handwritten notes. You can even put blank bullets in the handout, indicating to your listeners that this is where you want them to jot down pertinent information. People remember more when they've written it down.
6. **Provide a table of contents for larger documents** (more than ten pages) This will not only make information easy to locate, it also provides an overview of the presentation, and will help people find specific information



months later when they need to retrieve it.

Also, page numbers are really helpful so that you (or they) can point to specific information during the presentation, and find it quickly.

7. **Make handout titles and section headings compelling.** Instead of using "sales report", use a positive phrase like "heading in the right direction" to induce curiosity and make people want to read.
8. **Use a consistent style in your presentation,** so that each page has the same basic format. Headings are all the same size and font, body text is the same size and font on each page, margins are consistent, etc. Nothing will give a shoddier impression than if it looks like ten different people prepared your presentation.
9. **Use graphics wisely.** A picture is worth a thousand words, and people will connect the content with graphic images as a way to remember information. However, too much cutesy clipart, or an overabundance of photos will make everything run together. When the graphics are too busy, nothing stands out. Your graphics should support the information you're trying to get across. Plenty of white space should also be your goal.
10. **Spend a little extra money on the outside cover of your handout.** Print it on a heavy card stock or photo paper, have someone do a professional design, make it attractive and compelling. It will raise its perceived worth by those who are using it, and it also reflects on the value of its content.
11. **Spend time on determining your content.** A presentation or training aid shouldn't be a manual. Distill and condense your information so that only key points are present. Give enough information to make it useful, but not so much that a reader will be overwhelmed or bored by it.

The time and effort you put into preparing a professional handout package for any presentation you make, will pay off in terms of how you (and your information) will be remembered.

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# When Procrastination Kills Productivity

It's happened to all of us who have worked from home. One morning you wake up, saunter into your office and sit down to check your email. You realize you can't really get started until you have your coffee, so off to the kitchen you go. As the coffee brews, you notice the dishes from last night are stacked up and so while you're waiting, you wash them up, only the coffee was done ten minutes before you finished. Back in your office, you wade through your emails and take out that report you've been trying to finish. Suddenly you remember that you're going out for dinner tonight and the white shirt you want to wear is dirty. So you get up and root through your bedroom to find enough whites to make a load and throw them in the washing machine. Back at your desk, you spend ten minutes thinking about the report and realize at the rumbling of your tummy, that you didn't have breakfast. You spend fifteen minutes trying to find something to eat. After you do, your mother calls and you know what happens when you put her off, so you spend another fifteen minutes on the phone with her. By now you've completely lost your train of thought for the report and decide to take a break and read that article you've had sitting on your desk for a week. On it goes throughout the day, and by 4:30, you realize you haven't written one word on your report.

According to Lionel L. Fisher, author of *"On Your Own, A Guide to Working Happily, Productively, and Successfully from Home"*, there are four types of procrastinators. The first step in dealing with the problem of procrastination is figuring out which one you are. The second is to put some strategies in place to fight procrastination. Here's a definition and strategy for each of these procrastinator types.

**Perfectionists** - these people procrastinate because their sights are set so high they intimidate

themselves into failing. They set out enormous, complicated tasks for themselves, and knowing they can't accomplish them to their standards, put them off until it's too late. They can commonly be heard lamenting "I could have done it if I'd had more time." **Strategy:** Set smaller goals that you can achieve to your high standards. You'll feel better about getting a lot of small things done well than not being able to do the one big thing perfectly. Buckle down and just do the small tasks and you'll soon realize you're half way to achieving the big ones. Realize that no one is perfect, not even you, and that your best is probably better than most other people's "perfect". Let things go. It's OK to have high standards, but they must be achievable for you.

**Adventurers** - Lionel says these people "create continual crises in their lives because they're hooked on hairpin chases and hairbreadth finishes." They like the adrenaline of the deadline, so they allow things to push them right to the edge, then find they're out of time to accomplish them. **Strategy:** Take up skydiving or bungee jumping! Find other outlets for your adrenaline rush and you'll be able to settle down to work more easily. If you enjoy coming down to the wire on projects and feel you work better when you're under a bit of pressure, create a schedule that gives you a little more than "just enough" time to complete it. Stick to that schedule and you'll find your work will get done - even if it's due in a few hours!

**Rebels** - these are folks who express their anger in a passive/aggressive manner - promising things they can't deliver, and then procrastinating to make sure they don't. This allows them to vent without confrontation, and not deal with the actual problems at hand.

**Strategy:** If you're involved in this type of behaviour, there's something deeper you need to look at. Ask yourself why you to commit to something you know you won't do. Ask yourself why you're angry at being asked to do it. If you can't get to the source, find a friend or a counselor who can help you get to the root of your behaviour so that you can get on track toward healthy work habits again.



**Decidophobics** - these are the people who can't bear to make a decision because they're afraid of every possible result. This paralyzes them into stalling, and hoping that eventually someone will take the responsibility out of their hands. **Strategy:** These are the most difficult to "cure", because the fear of making decisions is so enormous. Decidophobics can often help themselves through situations by asking themselves - what's the worst thing that can happen if I do this? Most often, they'll realize that even if the worst does happen (which usually doesn't), they would survive it just fine. Make small decisions every day, and after you've had success with those, try a few bigger ones. You'll soon be on your way to becoming a "decidoholic"!

I'd like to add a fifth category to Lionel's list (only because that's the one I fall into), the "**Wanderers**". These are people who find everything so interesting and compelling, that one thing genuinely leads to another (the coffee, the laundry, breakfast, the magazine article), while what they're supposed to be paying attention to (the report) gets forgotten, until they see it sitting on their desk again. **Strategy:** Sheer discipline is the only way to cure wanderers. They need schedules and timetables and organizers. The trick for wanderers is to realize when they're wandering and to get back on track as quickly as possible. Set yourself a task, and then don't do anything else until that task is completed. Go get your coffee, but don't touch those dishes! Focus on getting that report done. Your mother can wait. Curbing wandering comes with awareness, so you might find it useful to keep a time diary for a few days to detect any patterns you may be falling into. Then, organize yourself toward task completion.

Procrastination gets the best of us all sometimes, and working from home where there's no one else to keep you accountable makes it even more difficult. Understanding your own weaknesses in the area of procrastination, and having a few strategies to combat them, will help you overcome this productivity killer.

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