

EliteTM
PRO SERVICE

A PEER GROUP OF THE INDUSTRY'S TOP SHOP OWNERS

2019 Leadership Conference





#1 The Pathway to Exceptionalism

by Bob Cooper of Elite

People first



TESLA



EliteTM
PRO SERVICE
A PEER GROUP OF THE INDUSTRY'S TOP SHOP OWNERS

My Objective

To help you with three industry challenges:

1. Customer retention & acquisition
2. The ever-growing shortage of technicians
3. Employee retention

People first

First
Things
First

Concern #1.

People first

Why many good customers

Never return

Their experience with the service provider.

“Whenever we buy a product, we will always remember the product. Whenever we buy a service, we will always remember....the people.”

People first



People first

The solution to good customers returning *and creating a buzz that brings in new customers*

1. Having the right people with the right training
2. Having the right culture
3. Having the right systems
4. Having the right goals
5. Having the right leadership... that leads to truly exceptional service



People first

Concern #2.

People first

Why good employees leave

1. The absence of the right people
2. The absence of the right culture
3. The absence of the right systems
4. The absence of the right goals
5. The absence of the right leadership



People first

Solve the employee *retention* problem by creating an exceptional environment, and you've not only solved your *recruiting* problem, but you've solved the *customer retention* problem at the same time.

People first

Here's How

To Bring it all together

People first

#1 The Pathway to Exceptionalism



#1 The Pathway to Exceptionalism



Create a Pathway to Exceptionalism
through a Purpose Driven Company

People first

Harvard University

August 2018

Requirements for a Purpose-Driven Company

1. You must discover your purpose
2. You must envision an inspired workforce
3. You must recognize the need for your authenticity
4. You must turn your authentic message into a constant message
5. You must stimulate individual learning
6. You must turn managers into purpose-driven leaders



People first

#1 The Pathway to Exceptionalism



Start with an inside out approach and a
re-appropriation of your advertising
budget

People first

#1 The Pathway to Exceptionalism

1. Ensure have the basics in place –
 1. Basic Compensation
 2. Opportunistic Income
 3. Exemplary Performance Reward
 4. Security
 5. Rewards for tenure
 6. Leadership... with a feeling they are now part of a family



The Elite 6

#1 The Pathway to Exceptionalism



1. Set your budget –

- Shop at \$1,000,000 annual sales / 4% adv. budget \$40,000
- Reallocation of 10% into the customer experience \$4,000
- Reallocation of 30% into employee development \$12,000



#1 The Pathway to Exceptionalism

1. Set your budget –

- Reallocation of 10% into customer experience \$4,000
 - Gifts for customers, items that reflect sympathy, appreciation, etc., customer care incentives, performance rewards, etc.



#1 The Pathway to Exceptionalism



1. Set your budget –

- Reallocation of 30% into employee development \$12,000
 - 6 employees = \$2,000 each
 - \$1,000 per employee
 - \$1,000 per family



#1 The Pathway to Exceptionalism



2. Meet with your entire team to share your vision, your goals, your plan, your excitement and your expectations. During this meeting you must also let them know you are genuinely interested in their personal development, and not just the advancement of their career related skill-set.



#1 The Pathway to Exceptionalism



3. Review any benefits that will be offered to all of your employees, and schedule one-on-one meetings with each employee to learn more about their interest and needs, and review the options that will be available to them.



Annual Investment

EXAMPLE



Individual Investment (Technician Mike Davidson) -

- Annual family membership to Dave Ramsey \$ 119
- 2 annual gym memberships \$ 600
- Costco & AAA memberships \$ 200
- Theme Park tickets for family of 4 \$ 500
- Annual contribution for children's higher ed \$ 500

Total investment \$1,919

1,919 X 6 employees = \$11,515 1.1% of \$1M

Annual Investment

EXAMPLE



Companywide Investment (Team of 6/ families of 4) -

• Team spirit/motivational posters, etc.	\$ 300	
• 24 books for entire team @ \$10 ea.	\$ 240	
• 48 family movie tickets @ \$10 ea.	\$ 480	
• 2 group family dinners @ \$600 ea.	<u>\$1,200</u>	
Total investment	\$2,220	0.2% of 1M
• 3 rewards for stopping smoking @ \$1,000 ea.	<u>\$3,000</u>	
Revised total investment	\$5,220	0.5% of \$1M

#1 The Pathway to Exceptionalism



4. Carefully review your Mission Statement with your team and ask for their thoughts. The objective is for every team member to embrace it, and its purpose. Furthermore, this will help foster the team/family spirit you are looking to further develop. The one's who have little or no interest? No worries... they'll be gone.

Mission Statement

#1 The Pathway to Exceptionalism



5. Provide all team members with a copy, and carefully review each of your Guiding Principles. As applicable, ask for their recommendations in developing the principles. These are to serve in great part as the glue that bonds your team together.

#1 The Pathway to Exceptionalism



6. At each team meeting discuss one of your Guiding Principles, and make a conscious effort to constantly reinforce that principle until your next meeting. You should also look for every opportunity for your team members to share their discoveries with their family members and friends. Once you have cycled through a review of all your principles, you should start the process over.

#1 The Pathway to Exceptionalism



7. You must be on the lookout for any behaviors (and the applicable results) that are in line with your Mission Statement, and any of your Guiding Principles, and acknowledge and/or celebrate accordingly. These are the learning opportunities that will modify behavior, and further bond your team together.



#1 The Pathway to Exceptionalism



8. You must explore every opportunity for your team members, and their families, to participate in events or celebrations. Furthermore, to foster a team spirit every employee should be provided with their own business cards.

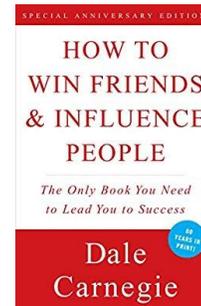
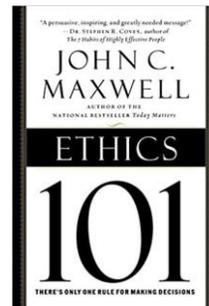
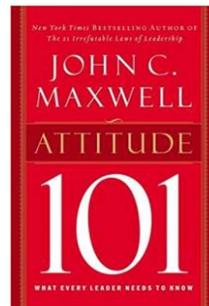


#1 The Pathway to Exceptionalism



9. Select a book that is in line with your Guiding Principles and that reinforces the behavior you are looking for. Once identified, provide a copy to all of your team members with instruction that they are to read X # of pages before your next team meeting.

continued...



#1 The Pathway to Exceptionalism



During the meeting each team member is to share their 2 greatest takeaways, and outline how they will use them in their personal life as well as their career. Note - This exercise will not only further bond your team, but when appropriate, you should provide your team members with copies for any applicable family members, and consider providing them in audio format as well.

#1 The Pathway to Exceptionalism



10. Think *inclusion*, not exclusion with your people, and with every possible decision, ask yourself: ***What kind of influence will this have on the culture of our company, and on the customer experience?*** The end goal must be unity and exceptionalism at every level.



next

In your Pathway to Exceptionalism

People first

next

In your Pathway to Exceptionalism



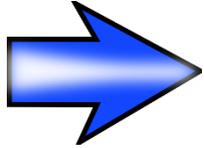
1. Make a personal commitment to developing a culture of exceptionalism.
2. Utilize your Elite Pathway to Exceptionalism Excel workbook.

People first

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved



Description

User Guide

This entire document has been created in order to provide you with a plan you can follow in order to accomplish three, primary objectives; To allow help you create an exceptional business that will organically attract more of the ideal customers, to help you better manage your marketing investments, and to improve both employee morale and tenure. All of which will lead to increased profitability, and a more valuable business. The two assumptions used are that in order to create a sustainable business you must employ the right people, and they must be committed to exceptionalism. In doing so, the service delivered will be viewed as extraordinary, and this in itself will contribute to a more respected and sought-after brand, an increase in repeat business, and more referrals. In developing a culture that leads to exceptional service you will need the proper goals, the right employees, and a plan you can use to not only create the appropriate culture, but equally as important, a plan that will allow that culture to continue for years to come. We realize that every business owner will have their own set of values, and interests, and we understand that no two business will be able to follow the identical paths. Accordingly, this plan has been created to provide you, not only with the relative instructions, but the needed flexibility as well. Lastly, we understand you will need to have the resources required to fund many of the items found in this plan. Accordingly, we propose you redirect a portion of your marketing budget into the application of the plan, and the ongoing development of your single, greatest asset, which are the people that work with you; Your employees.

Cultural Identification - First Things First

Putting first things first, in your quest for exceptionalism the culture you embrace must be of a higher purpose, and be one that will be embraced by your ideal employee. In all cases, you must adopt a humanistic company philosophy that is concerned with employee as a whole, and not just their professional contributions. As for the culture of your company, there are countless options that are available to you. At Elite we have developed a culture of ethics that leads to our exceptionalism in the market place, yet there are many options available. As an example, you may choose to develop a culture that is committed to helping others, or to protecting the environment, yet regardless as to the culture you choose, you must have a mindset that your company will prosper for decades to come, and you must instill a company wide mindset whereas your team is constantly thinking in terms of "we" rather than "me." According to Harvard Business Review, in order to create a purpose-driven organization such as the one you will be developing, six things must occur. 1. You must envision an inspired workforce. 2. You must discover your purpose. 3. You must recognize the need for authenticity. 4. You must turn your authentic message into a constant message. 5. You must stimulate individual learning. 6. You must turn your managers into purpose-driven leaders. This entire document has been designed to help you do just that. As your first step, you will need to clearly identify the culture of your organization, and enter it below.

Company Culture

Step #1. Enter description here

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

Description

User Guide

This entire document has been created in order to provide you with a plan you can follow in order to accomplish three, primary objectives; To allow help you create an exceptional business that will organically attract more of the ideal customers, to help you better manage your marketing investments, and to improve both employee morale and tenure. All of which will lead to increased profitability, and a more valuable business. The two assumptions used are that in order to create a sustainable business you must employ the right people, and they must be committed to exceptionalism. In doing so, the service delivered will be viewed as extraordinary, and this in itself will contribute to a more respected and sought-after brand, an increase in repeat business, and more referrals. In developing a culture that leads to exceptional service you will need the proper goals, the right employees, and a plan you can use to not only create the appropriate culture, but equally as important, a plan that will allow that culture to continue for years to come. We realize that every business owner will have their own set of values, and interests, and we understand that no two business will be able to follow the identical paths. Accordingly, this plan has been created to provide you, not only with the relative instructions, but the needed flexibility as well. Lastly, we understand you will need to have the resources required to fund many of the items found in this plan. Accordingly, we propose you redirect a portion of your marketing budget into the application of the plan, and the ongoing development of your single, greatest asset, which are the people that work with you; Your employees.



Cultural Identification - First Things First

Putting first things first, in your quest for exceptionalism the culture you embrace must be of a higher purpose, and be one that will be embraced by your ideal employee. In all cases, you must adopt a humanistic company philosophy that is concerned with employee as a whole, and not just their professional contributions. As for the culture of your company, there are countless options that are available to you. At Elite we have developed a culture of ethics that leads to our exceptionalism in the market place, yet there are many options available. As an example, you may choose to develop a culture that is committed to helping others, or to protecting the environment, yet regardless as to the culture you choose, you must have a mindset that your company will prosper for decades to come, and you must instill a company wide mindset whereas your team is constantly thinking in terms of "we" rather than "me." According to Harvard Business Review, in order to create a purpose-driven organization such as the one you will be developing, six things must occur. 1. You must envision an inspired workforce. 2. You must discover your purpose. 3. You must recognize the need for authenticity. 4. You must turn your authentic message into a constant message. 5. You must stimulate individual learning. 6. You must turn your managers into purpose-driven leaders. This entire document has been designed to help you do just that. As your first step, you will need to clearly identify the culture of your organization, and enter it below.

Company Culture

Step #1. Enter description here

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

Description



Crafting Your Mission Statement

Your "Goals" reflect the destination, whereas your Mission Statement describes the journey. In essence, it's a brief story of what you do and why. In crafting your Mission Statement you should consider all the stakeholders, because there are many that are and will be impacted by your business. Accordingly, it should consider your stock holders and family members, the employees, your customers, vendors, community and industry. When finished, it should be something that you, your family, and all the stakeholders would be proud to see. As an example, the following is Elite's Mission Statement. Once you can finalized yours, enter it in the below field. Elite Mission Statement - "*Elite's mission is to use our team of the top experts in America to help automotive professionals reach their goals and live happier lives, while elevating the industry that we love so much. This mission will be accomplished without ever compromising our ethics, or the trust that is placed in us.*"

Mission Statement

Step #2. Enter Mission Statement here

Guiding Principles

Step #3. See separate page

Learning about Your Employees

Step #4. See separate page

Culture & Team Spirit Development

Step #5. See separate page

Create Career & Personal Development Plans

Step #6. See separate page

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

Description

Crafting Your Mission Statement

Your "Goals" reflect the destination, whereas your Mission Statement describes the journey. In essence, it's a brief story of what you do and why. In crafting your Mission Statement you should consider all the stakeholders, because there are many that are and will be impacted by your business. Accordingly, it should consider your stock holders and family members, the employees, your customers, vendors, community and industry. When finished, it should be something that you, your family, and all the stakeholders would be proud to see. As an example, the following is Elite's Mission Statement. Once you can finalized yours, enter it in the below field. Elite Mission Statement - *"Elite's mission is to use our team of the top experts in America to help automotive professionals reach their goals and live happier lives, while elevating the industry that we love so much. This mission will be accomplished without ever compromising our ethics, or the trust that is placed in us."*

Mission Statement

Step #2. Enter Mission Statement here

Guiding Principles

Step #3. See separate page

Learning about Your Employees

Step #4. See separate page

Culture & Team Spirit Development

Step #5. See separate page

Create Career & Personal Development Plans

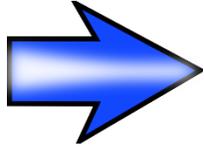
Step #6. See separate page



Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved



Description

Step #3. Identifying your Guiding Principles

Your Guiding Principles can be best described as a list of rules that you use in the operation of your business. They will address how you and your team members are to behave, and should address subjects such as honesty, respecting one another and assuming personal responsibility. In all cases they must support your Mission Statement and the culture of your organization. As an example, the following is one of our Guiding Principles at Elite. *"Never put Money ahead of People - In making any decision we must always consider the impact it will have on our clients, our industry, our team members and society at large. When a customer should not be charged for the services that have been provided, this is when we must abide by this principle. This is the very, same principle that requires the prices we charge to be commensurate with the value that is delivered. At Elite we will always strive to keep our prices as affordable as possible, and we will never raise our prices just because we are able to do so. Accordingly, and as an industry-leading company, we will encourage our clients, our coaches, and the industry at large, to adopt this guiding principle as well."* Once you have concluded as to the subject and title of each principle, you should carefully evaluate your decisions to ensure you feel comfortable with your choices. Once concluded, you should write the appropriate definition of each principle in order to ensure it can and will be clearly understood (and embraced) by your team members. Once finalized, list them below.



Guiding Principles

List your Guiding Principles below. The number you create is elective, yet in all cases, they must support your culture and your Mission Statement.

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

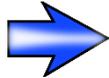
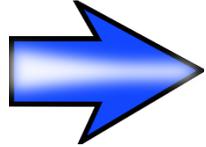
Description

Step #4. Learning about your employees

The more you know and understand about your employees and their families, the more successful both you and they will be. By your making a conscious effort to learn about them they will have a better understanding as to how much you care about them as a person, and that in itself will lead to a more satisfied and productive employee. It will also put you in a position to better understand their personal interests and needs, their motivators, and their areas of concern. This discovery is a prerequisite to creating the employee relationship that is necessary to foster the team spirit and lead the exceptionalism in service you are looking to provide.

The Discovery Process

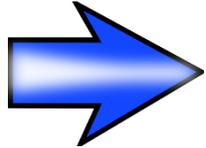
1. Have all new-hires and existing employees complete the "Getting to Know You" form found within this document
2. Meet with each existing employee in order to learn about their goals and determine what motivates them
3. Learn as much as possible about the family's of your employees without overreaching
4. Schedule semi-annual reviews with each employee using the "Employee Review Guide" found within this document



Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved



Description

Getting to Know You

Learning a little bit about you!

It would be great if you could take just a few minutes to complete this form and return it to us. We view our team members as a part of our family, so the better we know you, the more enjoyable our relationship will be. Thanks!

(Enter the employee's name here)

please enter answers below

Birthday

Place of birth

Name of your spouse or significant

Name of children

Names & types of any pets you have

Favorite type of animal

Favorite color

Hobbies

Favorite type of food

Favorite type of music

Favorite entertainer

Favorite sport & team

Favorite types of books

Favorite type of movies

Two favorite subjects to talk about

Getting to Know You

Learning a little bit about you

It would be great if you could take just a few minutes to complete this form and return it to us. We view our team members as a part of our family, so the better we know you, the more enjoyable our relationship will be. Thanks!

- #1. Your name _____
- #2. Your birthday _____
- #3. Your place of birth _____
- #4. Name of your spouse or significant other _____
- #5. Names of your children _____

- #6. Favorite type of animal _____
- #7. Names & types of pets you have _____

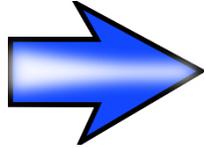
- #8. Favorite color _____
- #9. Hobbies _____
- #10. Favorite type of food _____
- #11. Favorite type of music _____
- #12. Favorite entertainer _____
- #13. Favorite sport & team _____
- #14. Favorite type of books _____
- #15. Favorite type of movies _____
- #16. Two favorite subjects to talk about _____

Getting
to Know You

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved



Description

Employee Review Guide

Exceptionalism requires a number of things, one being, ongoing communication between you and your team. By having regularly scheduled reviews with each employee you will be better ensuring their ongoing development, their tenure, and their commitment to exceptionalism. This easy to follow Employee Review Guide will help you do just

(Enter the employee's name here) **(Enter review date here)**

#1. With every new hire -

Week 1: Daily reviews

Week 2-4: Weekly reviews

Month 2-3: Monthly reviews

Month 6-12: Quarterly reviews

Ensuing years: Semi-annual reviews

#2. Prepare like a Pro -

Provide a 10 day notice

Provide the employee with the agenda -

1. Review of their compliance with company policies and all previously agree-to action items
2. Review of the job goals, deadlines & minimum levels of acceptable performance
3. Review of their career & personal development as well as any associated career advancement
4. Their recommendations on how the company can improve
5. Their recommendations on how you can improve as their manager and the leader of the company

Research & document the employees history of productivity, compliance, career & personal development, and advancement

Create a Guide you can use that includes all the above and any and all next steps that will be taken

#3. Review like a Pro -

Ensure you have allocated enough time and ensure you are both relaxed

Using your agenda as your meeting guide

Have the employee perform a self-evaluation and draw out their recommendations as to how they feel they can improve

Incorporate comments and questions that are relative to your culture, Mission Statement & Guiding Principles

Draft (or review) their Career & Personal Development Plan

Agree to all action items and the associated deadlines

Have the employee review the company

Have the employee review you as their manager/direct report

Update all your meeting notes and provide the employee with a post-review summary of all action items

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

Description

Step #5. Culture & Team Spirit Development

The path to exceptionalism starts with your commitment to your culture, your mission, and your employees. Accordingly, you need to ensure the culture of your organization is front and center at all times, and it needs to be a part of the conversation whenever possible. In the application of the below, anything you can do to foster group activities, and buddy-systems, will help bond your team together, and foster the team spirit that is required for an exceptional environment.

General Implementation of Culture & Team Spirit - Facility & Marketing

Mission Statement -

Post on all business cards

Post on all repair orders & collateral materials

Post on your website & imbedded in all available (and appropriate) marketing materials

Post in clear view of all walk-in customers

Post beneath your email signatures

Include your Mission Statement & Guiding Principles in your recruiting packets

Share your Mission Statement, and your defined culture, at every, appropriate opportunity and encourage your team members to do the same

Inspirational posters, desk & toolbox items, etc. that address your culture & team spirit

Cultural Implementation with New-Hires

1. Ensure all new hires are aware of your quest for exceptionalism, your culture, your team spirit & their pathway to success

2. Depending on it's length & complexity, have all new-hires memorize your Mission Statement, and be able to recite the general meaning & purpose of each of your Guiding

3. Have all new-hires read How to Win Friends & Influence People (one chapter at a time) and report their discoveries. This same process should be followed by Ethics 101 & Attitude 101

Note - In the above reporting process, have the employee tell you their key take-aways, how they will apply them to their job and their personal life, and how they will benefit

You are to also look for every opportunity to reinforce your quest for exceptionalism, the value of your Mission Statement, your Guiding Principles and team work

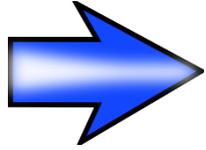
4. Review the Career Development Plan with each new hire

5. Ensure that once they have completed any probationary period, they will be provided their own business cards

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved



Description

Step #5. Culture & Team Spirit Development

The path to exceptionalism starts with your commitment to your culture, your mission, and your employees. Accordingly, you need to ensure the culture of your organization is front and center at all times, and it needs to be a part of the conversation whenever possible. In the application of the below, anything you can do to foster group activities, and buddy-systems, will help bond your team together, and foster the team spirit that is required for an exceptional environment.

General Implementation of Culture & Team Spirit - Facility & Marketing

Mission Statement -

Post on all business cards

Post on all repair orders & collateral materials

Post on your website & imbedded in all available (and appropriate) marketing materials

Post in clear view of all walk-in customers

Post beneath your email signatures

Include your Mission Statement & Guiding Principles in your recruiting packets

Share your Mission Statement, and your defined culture, at every, appropriate opportunity and encourage your team members to do the same

Inspirational posters, desk & toolbox items, etc. that address your culture & team spirit

Cultural Implementation with New-Hires

1. Ensure all new hires are aware of your quest for exceptionalism, your culture, your team spirit & their pathway to success

2. Depending on it's length & complexity, have all new-hires memorize your Mission Statement, and be able to recite the general meaning & purpose of each of your Guiding

3. Have all new-hires read How to Win Friends & Influence People (one chapter at a time) and report their discoveries. This same process should be followed by Ethics 101 & Attitude 101

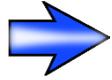
Note - In the above reporting process, have the employee tell you their key take-aways, how they will apply them to their job and their personal life, and how they will benefit

You are to also look for every opportunity to reinforce your quest for exceptionalism, the value of your Mission Statement, your Guiding Principles and team work

4. Review the Career Development Plan with each new hire

5. Ensure that once they have completed any probationary period, they will be provided their own business cards



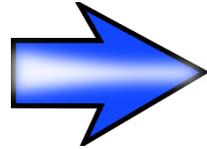


Cultural Implementation & Ongoing Reinforcement with Existing Employees
1. Ensure anyone (including outside service providers) that are responsible for Customer Care calls is aware of your quest for exceptionalism, your culture, and your team spirit.
2. Ensure all team members are aware of your quest for exceptionalism, your culture, your team spirit & their pathway to success
3. Depending on it's length & complexity, have every team member either memorize & recite your Mission Statement, or describe its meaning to you. They are also to tell you how
4. Provide every employee with a copy of your Guiding Principles & review one at each team meeting. When you have cycled through the list, restart the process
Note - Ensure you keep the most recently discussed Guiding Principle at the top of everyone's mind until the next principle is discussed
5. Have all employees read "How to Win Friends & Influence People" a chapter at a time -
Note - Ensure you keep the most recently discussed Guiding Principle at the top of everyone's mind until the next principle is discussed
You are to also look for every opportunity to reinforce your quest for exceptionalism, the value of your Mission Statement, your Guiding Principles and team work
At the end of each of each reporting session, encourage your employees to share their discoveries with the appropriate family members and friends
Once the book review has been completed, select another book and complete the same process
6. Misc. -
In your quest for exceptionalism, you must look for opportunities to celebrate behaviors that are inline with your Mission Statement, Guiding Principles & team work
Have your team attend group training programs and work together in solving problems
Capture images of your team/team members whenever possible and use them throughout your marketing channels
Celebrate birthdays by hosting a team lunch, allow the employee a day off, and posting in social media when appropriate
Celebrate & reward both 5 star reviews and referrals as the result of specific employee behaviors
Celebrate career and noteworthy personal successes, draw attention to the specific behavior, and share the successes in marketing channels when appropriate
Host group events for your team & their families (picnics, museums, sporting events, etc.)
Have your team attend group events (tradeshows, etc.) as a team, whenever possible

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved



Description

Team Meeting Guide

Exceptionalism requires a number of things, one being, ongoing communication between you and your team. By having regularly scheduled Team Meetings you will further their commitment to your goals, to your culture and your quest for exceptionalism.

Meeting Preparation -

1. Review your Long-term & Short-term goals
2. Clearly define all job goals, performance expectations and deadlines
3. Perform any required one-on-one meetings with appropriate team members
4. Create the meeting agenda
5. As may be necessary, meet with management & review the agenda
6. When applicable, ask each team member to come prepared with at least one recommendation that is relative to the goals
7. Be prepared to discuss & celebrate all successes (and the relative behavior) that is specific to the mission, culture & teamwork

Meeting Guide -

1. Thank all participants & review your Mission Statement as well as your Long-term goals
2. Ensure all participants are aware of meeting guidelines (no interruption, not being critical of others, etc.)
3. Review the agenda
4. Discuss carry-over items from last meeting
5. Discuss safety items and any relative changes to company policies
6. Review the Short-Term goals, to-date progress & successes that are relative to exceptionalism
Note - Share & celebrate all successes (and the relative behavior) that is specific to the mission, culture & teamwork
7. Discuss all relative challenges, and draw solutions out of the participants
Note - With the above, ask how each recommendation will impact the your culture and the customer experience
8. Discuss all relative/upcoming training opportunities
9. Conduct or discuss the results of team assignments such as book reviews
10. Make all necessary assignments
11. Review one of your Guiding Principles -
Note - Ask that they look for opportunities to consciously apply the principle during the ensuing week
When appropriate ask that they share the Guiding Principle with their family

Post Meeting -

1. Document the meeting minutes
2. Create a plan for reinforcing any reviewed any Guiding Principle and/or book take-aways, as well as noteworthy behaviors
3. Follow up with each employee to show your appreciation and discuss the implementation of any relative action items
4. Properly reward the relative individuals

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

Description

Step #6. Create Career/Professional & Personal Development Plans

Career/Professional Development Plan

Consider the budget for each employee as well as the job, company & personal goals of the employee, and the associated deadlines.

Resources -

1. Service advisor & technician career path guides located in the last section of the Elite Apprentice Guide
2. Online, classroom, in-shop & mentor training
3. Incentives & rewards for career development -
 - Financial rewards (increase in pay scale, completion bonus's, etc.)
 - Tool allowances (financial contributions, complimentary tools & equipment, etc.)
 - Gifts that will be received and/or appreciated by their family
 - Recognition (social media, local media, card to their family, etc.)
 - Retirement contributions
 - Advancement in the company
 - Opportunity to share their new knowledge with others and/or at team meetings
 - Opportunity to mentor others

Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

Description

Step #6. Create Career/Professional & Personal Development Plans

Financial Development Plan

Consider the annual budget for each employee and allow them (and/or their family) to select the category/categories to

Subject -

Objective

Resource

General finance

Assistance with understanding finances, saving & budgeting

Dave Ramsey materials/courses/subscriptions
 Instruction on how to keep proper financial records
 Local bankers
 Online courses

Retirement programs, Social Security & Long-Term Care

Assistance with understanding such programs & their value

Dave Ramsey materials/courses/subscriptions
 Financial Planners & Brokers
 Inviting in subject matter guest speakers
 Online courses

Credit worthiness

Assistance with understanding credit scores & their value

Education on scoring agencies & protecting identity
 Local bankers

Taxes

Assistance with understanding income tax

Inviting in your accountant as a guest speaker
 Online courses

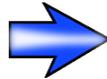
Funding higher education

Assistance with understanding how to set goals, plan & fund

Dave Ramsey materials/courses/subscriptions
 School counselors
 Financial Planners & Brokers
 Local and/or targeted schools/colleges

Assistance with understanding of life, home/renters & car ins.

Insurance agents
 Inviting in subject matter guest speakers



Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

Description

Step #6. Create Career/Professional & Personal Development Plans

Health & Physical Development

Establish the annual budget for each employee and allow them (and/or their family) to select the

Subject -	Objective	Resources
First aid & home emergencies	Assistance with understanding	Local fire department
Workplace safety	Assistance with understanding	Insurance carriers & OSHA
Physical fitness	Overall fitness	Guest speakers from local hospitals & schools
		Contests or buddy systems for weight loss
		Contests or buddy systems for stopping smoking
		Gym membership and/or contributions
	Substance abuse	Guest speakers from local hospitals & schools
		Access to professional help with substance abuse
	Nutrition	Guest speakers on healthy eating, how to read labels, etc
		Books & access to relative websites (for-fee & no charge) for the families of employees
		Hosted healthy lunch 1X month
	Stress management	Guest speakers



Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

Description

Step #6. Create Career/Professional & Personal Development Plans

Intellectual Development

Establish the annual budget for each employee and allow them (and/or their family) to select the category/catagories to

Subject -

Objective

Resources

General life skills

Assistance with learning basic civics & the voting process

Direction to government websites & materials

Safe websurfing

Access to websites that provide training on basic technology, etc.

Interpersonal skills

Skill development

Dale Carnegie courses

Books & audio (Carnegie, Maxwell, etc.)

Perform Team Meeting book reports

Rewards for noteworthy applications

Books/videos on human emotions & how to manage them

Higher Education

Intellectual growth

Online courses

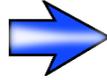
Books & online courses for the employee and their families

Invite in subject matter experts

Rewards for course completion

Rewards for relative application

Rewards for learning a second language and/or mastering English



Pathway to Exceptionalism

Elite Employee & Cultural Development Program

copyright Elite Worldwide, Inc. all rights reserved

Description

Step #6. Create Career/Professional & Personal Development Plans

Family & Social Causes

Establish the annual budget for each employee and allow them (and/or their family) to select the category/catagories to invest in.

Subject -

Objective

Resources

Estate Planning

Assistance with learning

A subject matter expert on wills & establishing life insurance needs

A subject matter expert on Long Term Care

Managing ageing parents

Assistance with learning

A subject matter expert

Books & audio programs

Provide access to websites

Child development

Assistance with understanding

A subject matter expert on child safety

A subject matter expert on child nutrition

Provide families with books, audios & online courses

Furthering a team & family spirit

Support the sporting teams of the children of your employee

Noteworthy occassions & accomplishments

Celebrating accomplishments & events of any and all family members

Greeting cards

Dinners

Gifts (relative to their accomplishment, hobbies, family, etc.)

Paid day off on their birthday

Celebrating any such occasion or accomplishment at the shop

Announcing the occasion or accomplishment of any family member through SM channels

Passes to amusement/theme parks

Movie tickets

Humanity & Community involmnet

Support & promote engagement

Participate in or organize charitable causes

Organizations such as MADD, Humane Societies, etc.

Companywide involvement

Promote team spirit

Holiday dinners

Company picnics

Contests where the employees compete against themselves



next

In your Pathway to Exceptionalism



1. Make a personal commitment to developing a culture of exceptionalism.
2. Utilize your Elite Pathway to Exceptionalism Excel workbook.
3. Utilize your Elite Customer Care Guide.

People first

Elite Customer Care Guide

#1 The Pathway to
Exceptionalism



next

In your Pathway to Exceptionalism

4. Never let go of your belief in...
 - 1) yourself and your abilities
 - 2) your goals
 - 3) your Mission Statement & your principles
 - 4) your people
 - 5) Exceptionalism

People first

next



Thank you

People first

next



Thank you

People first