



IMEC

Strengthen Business Infrastructure

**How to Cure Back-Office Blues &
Achieve Smooth Operations**

Facilitated By: Alicia Butler Pierre, Equilibria, Inc.

September 1, 2022

Agenda

- Introductions
- What is Business Infrastructure?
- Building the Foundation
- Next Steps/Completing the Foundation
- Q&A

Introductions

Alicia Butler Pierre, MBA

Consultant • Speaker • Author • Podcaster • Professor

23 years experience in **Operations**

Specialties: Lean Six Sigma, Process Design & Improvement,
Project Management, Business Infrastructure



Ancient Civilizations



Globetrotter



@AliciaButlerPierre



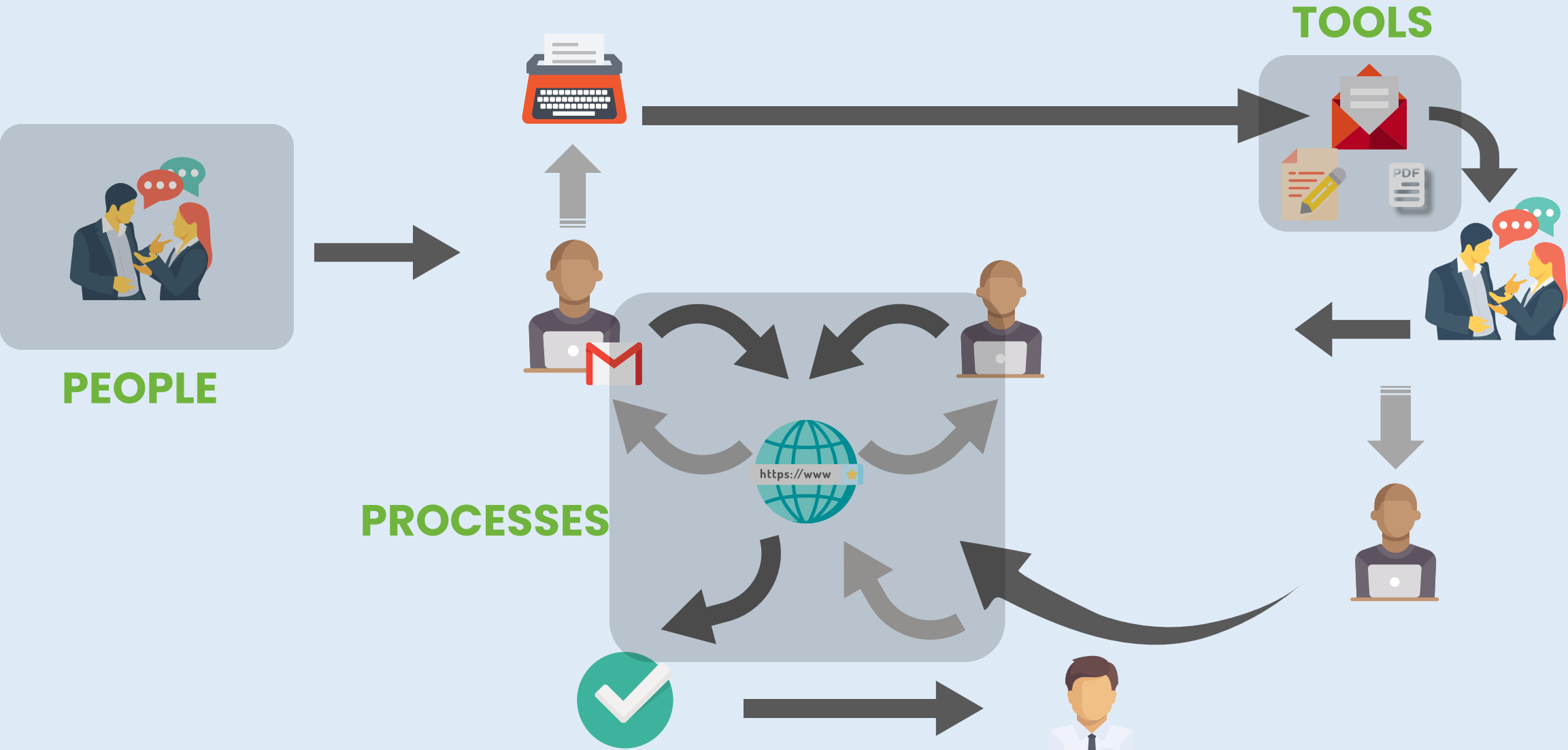
About You...



1. How old is your business?
2. Are you familiar with Lean Six Sigma?
3. Do you know what **business infrastructure** is?



BUSINESS INFRASTRUCTURE



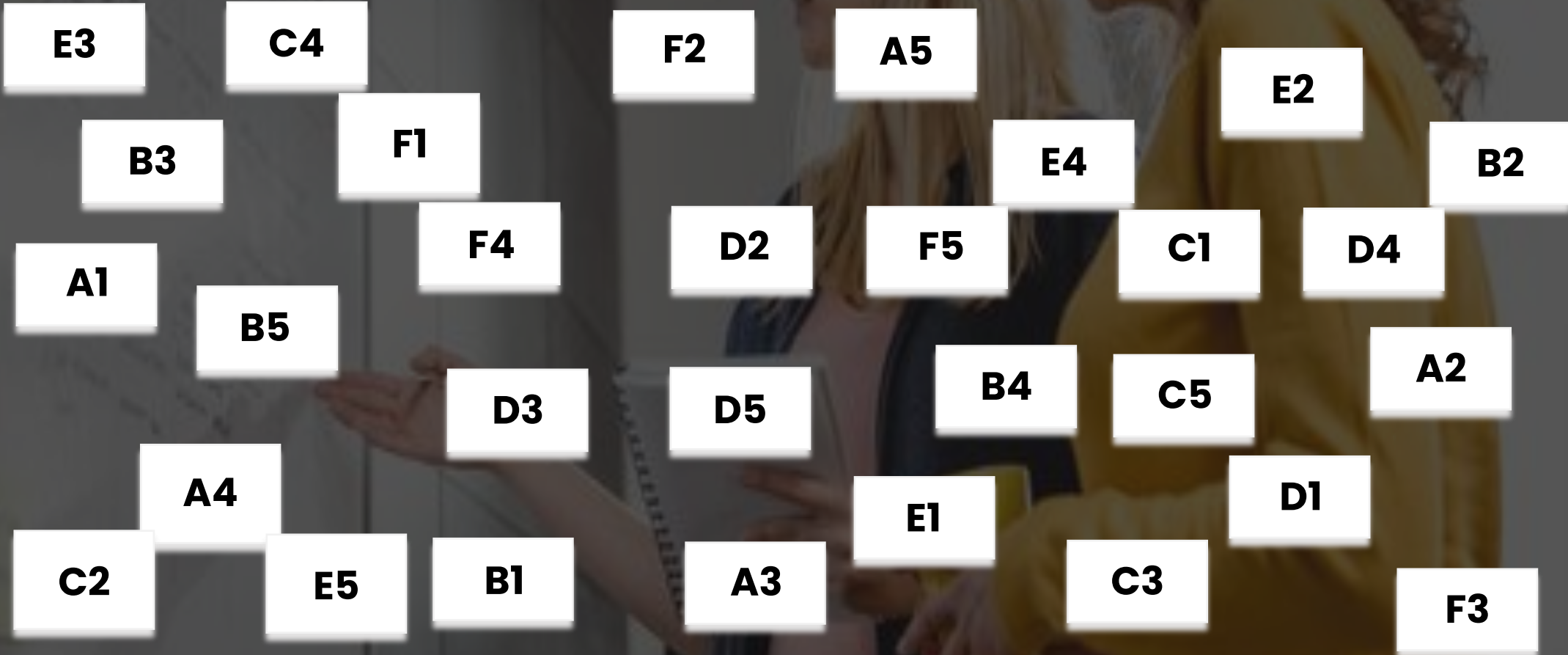
1 **What** work needs to be done?

2 **How** is that work organized?

3 **Who** will do the work?

4 **How** is the work performed?

1 What Work Needs to be Done?



1 What Work Needs to be Done? Business Parts Analysis

Task A



BUSINESS PARTS ANALYSIS™ TASK IDENTIFIER
What's Under Your Company's Hood?

<p>Accounting & Finance</p> <ul style="list-style-type: none"> account reconciliation accounting software accounts payable accounts receivable asset management balance sheet bank accounts bookkeeping/lists entry cash flow statement chargebacks check of accounts collections cost of goods sold credit cards crowdfunding equity financing expense reports factoring financial projections financial reporting forecasts fundraising investments liabilities liens/notes merchant accounts net worth net worth statement profit and loss statement project feasibility recruitment management reconciliation refunds/returns tax returns venture capital 	<p>Marketing</p> <ul style="list-style-type: none"> advertising APIs promotion pricing price distribution product/service articles conferences branding content calendar case studies customer relationship mgmt demographic research & data direct mail email events geographic research & data gifts infographics interviews landing pages marketing research marketing strategy memberships networking partnerships photography/images presentations psychographic research & data public relations public speaking publicity referral program sales search engine optimization segmentation analysis senior leadership social media Sponsored surveys trade shows video website white papers 	<p>Operations/Research/ Business Development</p> <ul style="list-style-type: none"> account management answer voice mail automation building reports business analysis check email check mail continuing education continuous improvement customer/client support efficiency facilities management fleet/vehicle management IT/AVC system maintenance inventory management new grounds/maintenance team systems SEO/keywords logistics magazine subscriptions manufacturing office maintenance office supplies ota monitor order parts/supplies for job processes, systems, procedures product delivery project management records management recycling resource management strategic alliances strategic planning streamlining supplier chain theory of constraints (lean/6sigma) titles management value chain vehicle repairs warranty 	<p>Human Resources</p> <ul style="list-style-type: none"> 401k forms 401k policies availability/cognition background checks change management company policies Dept. of Labor info employee benefits employee health insurance employees (full-time/part time) HR forms independent contractors interviews job candidate interviews leadership development mentoring new hire package onboarding/orientation organization chart parent management performance evaluations post job openings public contract bids records management recruiting remote/virtual workers resume maintenance retirement rewards/incentive program salary uniforms W-2 forms W-9 forms workman's comp. 	<p>Technology</p> <ul style="list-style-type: none"> apps domain name registration copier cloud computing content security cybersecurity data backup data merger data governance data security data synchronization digital assets management network solutions electronic database equipment maintenance equipment purchasing fax machine hardware maintenance network solutions password list management privacy policy phone system mobile phones software purchasing software training password 	<p>Legal/Compliance</p> <ul style="list-style-type: none"> ADA/VOSH/HPPE/OSHA/DOT annual Sec. of state registration assets business insurance business license business plan business tax renewal certifications city regulations contract review contract (employee, vendor) copyrights employee identification number federal regulations franchise industry record keeping intellectual property lease agreement/renewal non-disclosure agreements RFI press communications RFP RFQ RFI SEC/Securities registration state regulations trade secrets trademark registration
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ANALOG TOOLS NEEDED:

- White Index Cards
- Sharpies or Markers
- Business Parts Analysis Task Identifier™



Exercise 1:

Identify Tasks in Your Business

↓ Download the Business Parts Analysis **Task Identifier™**.

↓ Download the Business Infrastructure **Worksheet**.

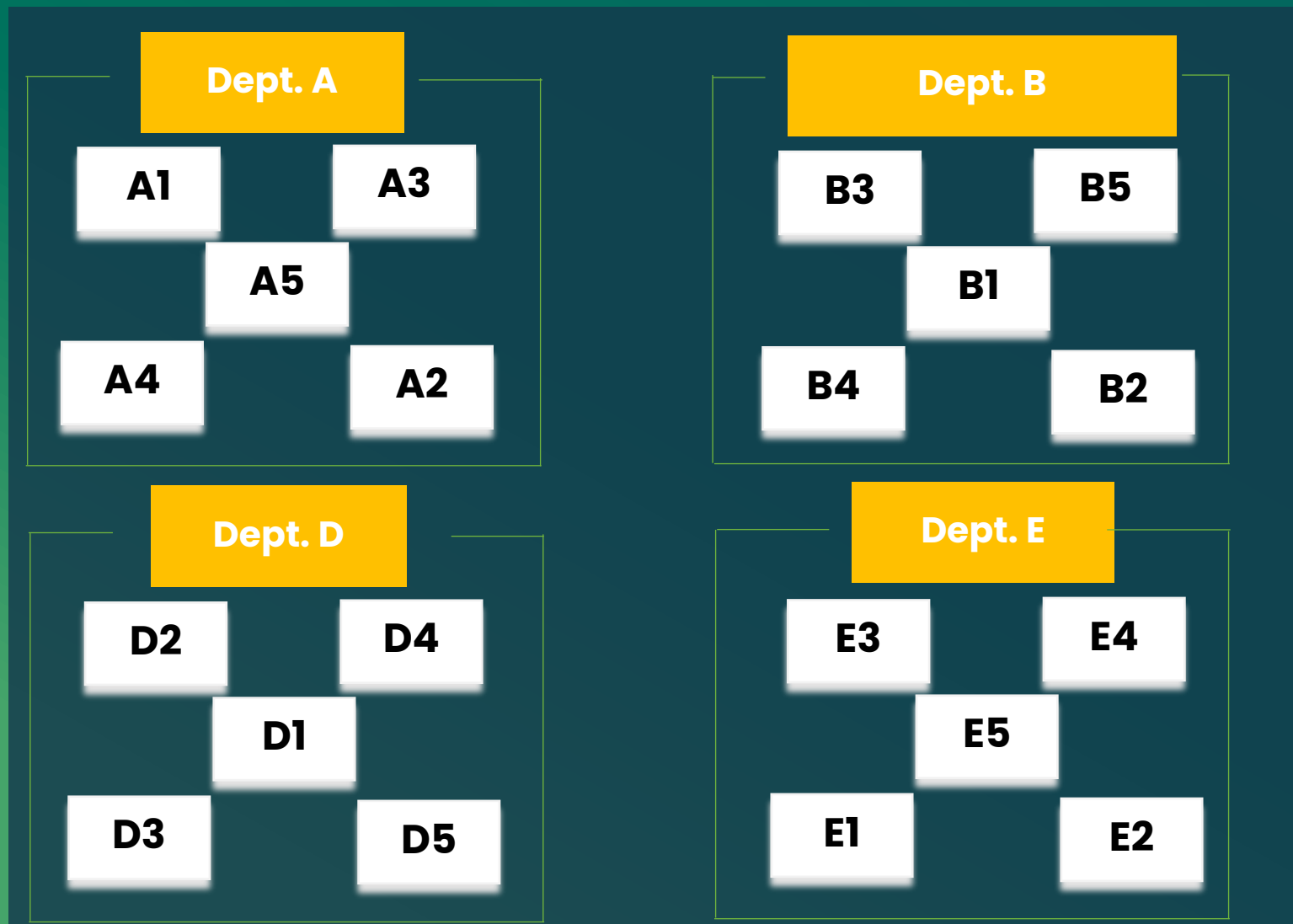
▶ Open both files.

▶ Brainstorm at least three tasks per main topic.

▶ Share results.



2 How is that Work Organized?



ANALOG TOOLS NEEDED:

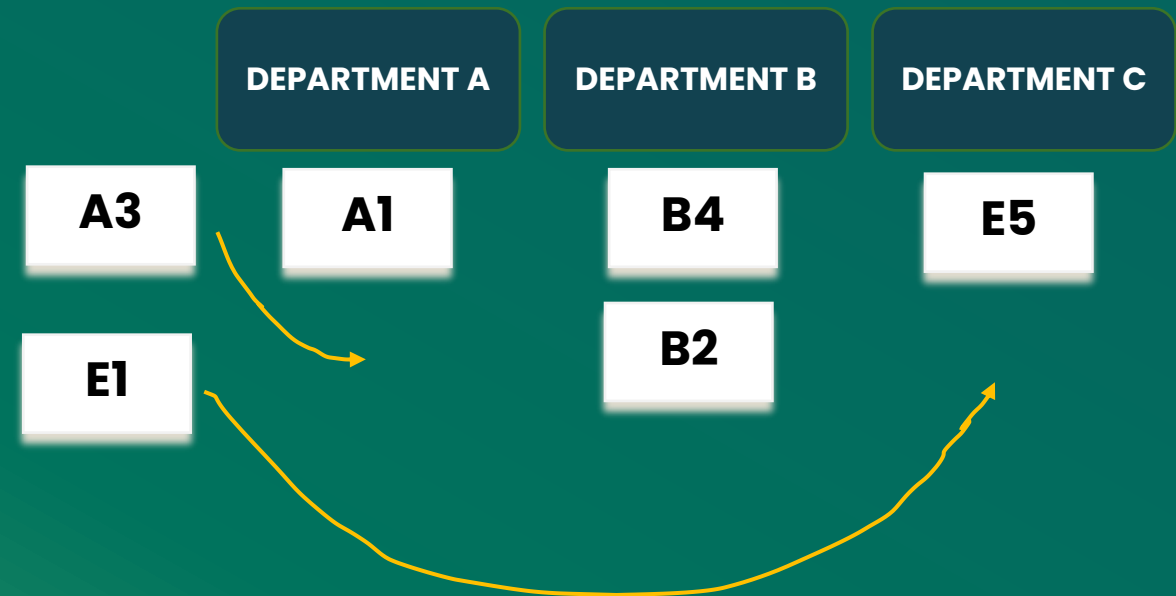
- Index Cards w/Tasks
- Different Color Index Cards
- Rubberbands
- Sharpies or Markers
- Large, Flat Surface



Exercise 2:

Group Tasks into Departments

- ▶ Open ppt file.
- ▶ Group similar tasks into columns by moving the text boxes on the Business Infrastructure **Worksheet**. Do not create more than 9 groups of tasks.
- ▶ Cut and paste the text boxes from slide 1 to slide 2.
- ▶ Type the name of the associated department.



3 Who Will do the Work?



ANALOG TOOLS NEEDED:

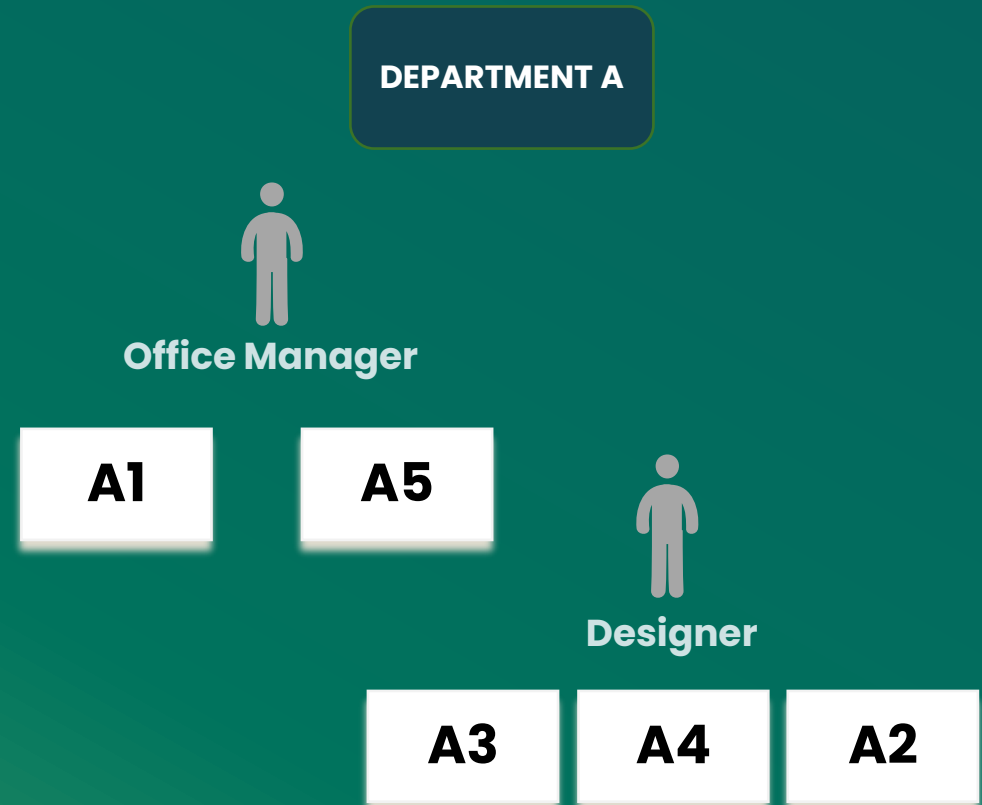
- Index Cards with Tasks
- Index Cards with Departments
- Rubberbands
- Stick Figures
- Multi-Color Dry-Erase Markers



Exercise 3:

Assign Roles to Tasks

- ▶ Open Business Infrastructure Worksheet file.
- ▶ Type the name of the *ideal* role or position (not a person's name) on each stick figure.
- ▶ Copy/paste to create more stick figures.
- ▶ Color-code each role:
 - Black = filled employee position
 - Red = vacant position
 - Blue = outsourced position



Outcome: Detailed Job Descriptions

ELEMENTS

Logo

Qualifications & Skills

Role Description

Job Requirements

Company Description

Benefits

Responsibilities

Salary

Special Projects

Proposed Hours & Travel Req'd.

Disclaimer

ABC Company

Junior Sales Associate

The Junior Sales Associate will represent PCG by working with existing and booking new clients, offering them the products and services needed throughout the client's developments. The Jr. Sales Associate is an independent contractor who licenses at all times, and, through initiative and performance, can become an Associate. The Jr. Sales Associate will report to the CEO.

Company Background

PCG (PCG) is a thriving independent insurance agency led by Dr. Albert, a specialist with over 18 years of experience in the industry. Our agency, located in Illinois, Mississippi, and South Carolina and offers a range of insurance products including Property & Casualty, Life & Annuities, Business, Supplemental, and Retirement. PCG is a fast-growing agency, you will have the opportunity to participate in an entrepreneurial program designed to put you on the path to one day owning your own business. With a strong focus on education, customer service, and quality, our team of starters looking to make a positive impact on the families and businesses of the South.

SALES OPERATIONS DEPARTMENT

Primary Duties and Responsibilities

- Research and attend insurance-related or vertical conferences and seminars.
- Exercise proper etiquette (i.e., language, social media, attire, etc.) when interacting with prospects and clients.
- Take required continuous education courses for State of GA.
- Sign all onboarding paperwork including 1099 and PCG Independent Contractor Agreement.

Special Projects Include:

- Submit insurance-related photos/images to CEO before posting.
- Maintain a separate personal and professional profile per social media.
- Consider speaking opportunities (i.e., organizations, summits, virtual events, podcasts, radio and TV shows).

Qualifications & Skills

- Comprehensive understanding of the agency's goals and objectives.
- Strong customer service orientation with a courteous and professional demeanor.
- Good analytical abilities and attention to detail.

Job Description - Jr. Sales Associate			
Revision #:	4	Revision By:	Alicia Butler Pierre
Revision Date:	07-09-20	Approved By:	Dr. Albert

ABC Company

- Excellent written and verbal communication skills.

Job Requirements

- 1 - 3 years' sales and/or customer service/support experience.
- Maintain insurance license in Property & Casualty and Life, Accident & Sickness at all times.
- Knowledge and comprehension of all insurance products offered by the agency.
- Fluency in Spanish is a plus.
- Proficient in Microsoft Office Suite: Outlook, Word, Excel, and PowerPoint.
- Must sign a contract with the agency that includes a 2-year Non-Compete Agreement.

Benefits

- Family-oriented and professional development environment offering:
 - Scheduling flexibility.
 - Travel Expense Reimbursement with potential for lodging and meal reimbursement.
 - Unlimited access to agency's office to work and/or meet with clients, as needed.
 - Path to becoming a Senior Sales Associate and eventually an independent Agent.

Salary

Commissions-based only.

Proposed Hours + Travel

- Minimum 40 hours per week, M-F
- Full-time, independent contractor
- Travel required: up to 30%

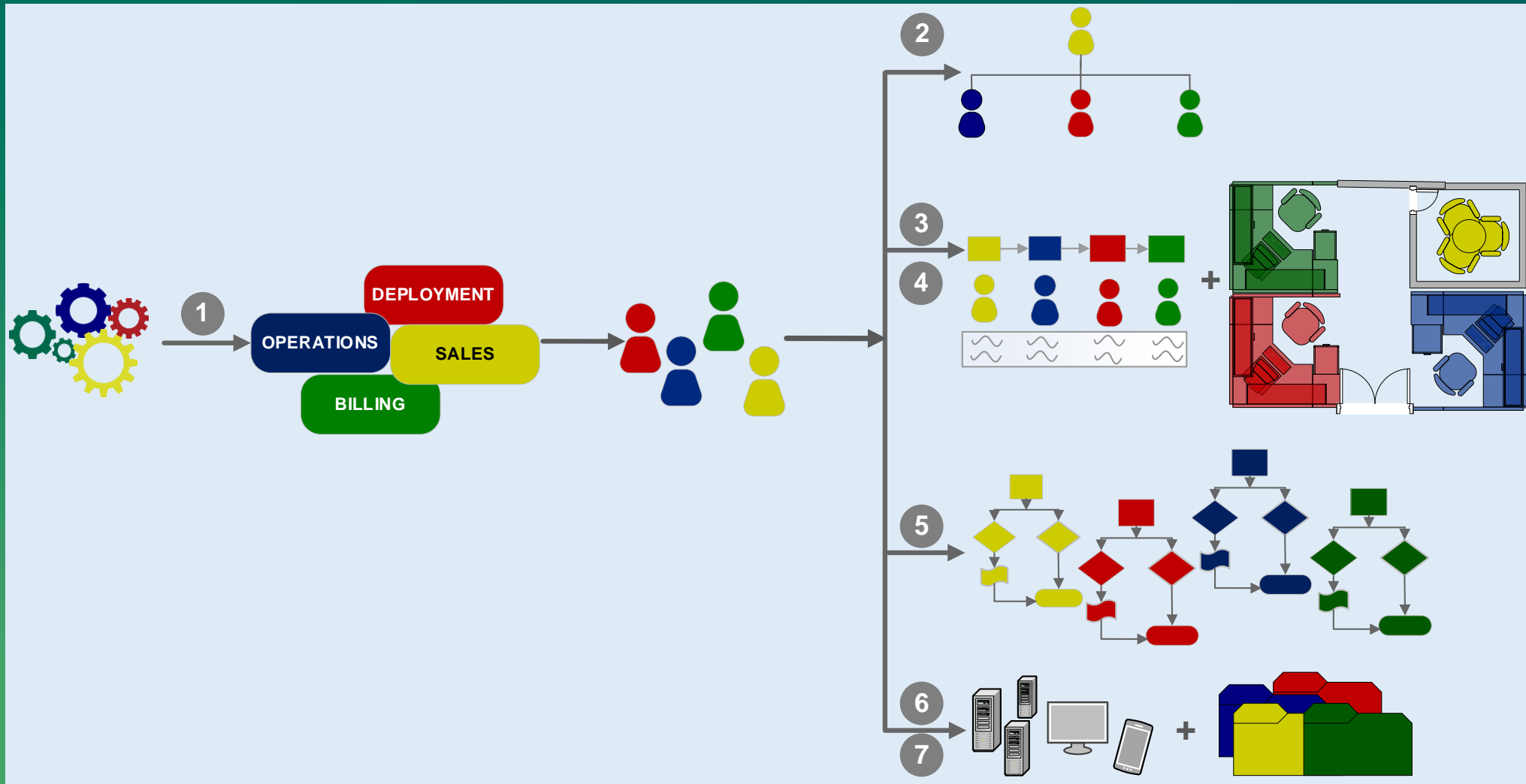
Disclaimer

The duties and responsibilities listed above are subject to change and may not reflect all tasks required. You can expect that as PCG continues to grow and evolve, certain tasks may be re-distributed in an effort to concentrate skills. Any change in duties and responsibilities will be discussed with you in advance.

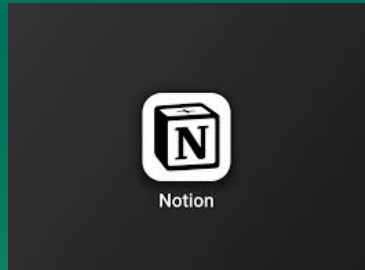
PCG is an equal opportunity employer.

Job Description - Jr. Sales Associate				Page 2 of 2
Revision #:	4	Revision By:	Alicia Butler Pierre	
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Completing the Foundation: The Whole Picture



Completing the Foundation: Ex.: Structure Your Projects & Processes



Equilibria, Inc. Projects

← → Equilibria, Inc. Projects

Quick Find

All Updates

Settings & Members

WORKSPACE

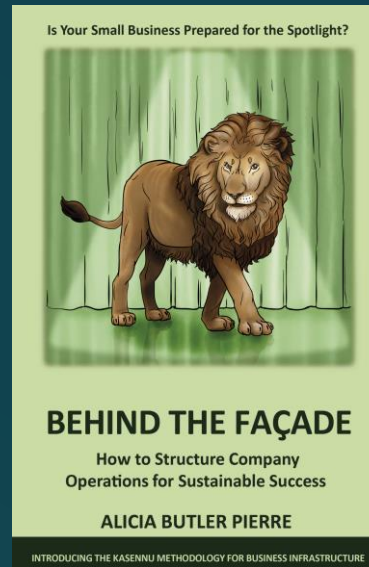
- ▶ 01_Operations
- ▶ 02_Marketing
- ▶ 03_Accounting
- ▶ 04_Business Development
- ▶ 05_Human Resources
- ▶ 06_Legal Compliance
- ▶ 07_Info Tech

Equilibria, Inc. Projects

Next Steps



1 Sign up for the FREE weekly newsletter.



2 Buy the Book.



3 Invest in the Online Course.

THANK YOU



