WorkOS

By Andrew Lynch

Hello! If you were sent here by Michael Girdley, then you should know two things:

- There's a lot less Chilli's content in here than you might be used to. Sorry, but I'm British. I don't really know what Chilli's is.
- If you like this document, then you'd probably also enjoy my blog Off The Books where I write more about this sort of stuff. You can sign up here.

These are the principles, processes and operating systems for being productive, both as an individual contributor, as a leader, and within a company. Some of these I've developed myself; most, I've learned from others, particularly Matt Mochary, Andy Grove, Greg McKeown, Cal Newport, and Tim Ferriss.

Contents

Foundational principles

- ABZ planning framework
  - A = where are you now
  - Z = long-term goal or vision
  - B = obvious next step
  - DO NOT GET DISTRACTED THINKING ABOUT STEPS C - Y. THEY DO NOT MATTER. JUST GET FROM A TO B.
  - Obvious Adams idea: just do the clear and straightforward next step, every time, for a long time.
- "Intensity is the strategy." -- Shaan Puri
- Testable fluency in the basics -- Joshua Kennon
- "Business is an elongated Act 2. Most of the important stuff happens in the less exciting, quite slow middle of the play." -- Charles Walton
- Everything in life compounds. Money, knowledge, relationships, competitive advantage. Put yourself and your company in situations where compounding can do the work for you.
- "Fortunes require leverage. Business leverage comes from capital, people, and products with no marginal cost of replication (code and media)." -- Naval
  - Nb Eric Jorgenson (or Jim O'Shaughnessy?) calls the latter "symbol manipulation" which I like
- "You must own equity - a piece of a business - to gain your financial freedom." -- Naval

- A lot of this is part of [the great online game](). "We're all effectively competing to hit the right keys on our keyboards in the right order, and that if we do it for long enough we can buy a house."
- Things you can do to be better at your job that require zero talent:
  - Responsiveness
  - Proactivity
  - Listening
  - Being likeable and easy to work with
  - Smiling
  - Dressing better and being more presentable
  - Being on time
  - Work ethic
- Maintain a high level of agency
  - Agency is trainable, Luca Dellanna: https://luca-dellanna.com/agency/
  - The high agency library by George Mack: https://x.com/george__mack/status/1751522832545107992?s=20

Working with yourself

Being an effective individual contributor mostly boils down to a few really important basics, done well over time. These are the brilliant basics, the core fundamentals.

Keeping your word

There's a regularly recurring meme that gets a lot of traction on Twitter every time some small business owner posts it. It's always some variation of this:

The best career advice for young people is to tell people what they intend to do, then do it. Every time.

This is regularly recurring advice because it is timeless wisdom that is true. It is also simple to say, surprisingly difficult to do, and incredibly valuable if you do it.

As an example of this, here are two anecdotes. One recent, one less so.

First, from Nathan Barry in his excellent post, [The Ladders of Wealth Creation]():

> "A *friend of mine with no plumbing experience bought a small plumbing company and doubled revenue in the first year with two simple changes:*
>
> 1. *Following up with customers*
> 2. *Doing what he said he was going to do."*

Secondly, from legendary investor Charlie Munger:

> *"Two partners that I chose for one little phase of my life had the following rule: They created a little design/build construction team, and they sat down and said, two-man partnership, divide everything equally, here's the rule; "Whenever we're behind in our commitments to other people, we will both work 14 hours a day until we're caught up."*
>
> *Well, needless to say, that firm didn't fail. The people died rich. It's such a simple idea."*

The reason this is valuable is because people like to work with -- and that means hire, retain, and contract with -- people they can depend on.

If I'm reliable, you can work off that -- make promises to clients, or plan around deadlines being hit, or just check in less and crack on with what you need to be doing yourself.

Whereas if I'm unreliable -- sloppy, tardy, inconsistent -- that creates friction and overhead that slows everything down.

You want to be as easy as possible to work with: which means high quality work, delivered in a timely manner, every time, with lots of updates, and in an ultra-reliable manner. If anyone has to chase you for anything, you've messed up somewhere. A person should be able to delegate you a task, and know in their heart of hearts that it'll get done well.

Getting Things Done

See e.g. Andreas Klinger on how to do it in Gmail, Tiago Forte in general for more on GTD. The book is boring but the system makes sense.

I personally struggle with super-complicated systems -- GTD makes sense, but feels like a lot of work -- so I implement two things:

1) Master to do list
    a) Capture literally everything on here. This is the lightweight version of GTD: I have sections for:
        i) Ready to go
        ii) Some day
        iii) Waiting on / follow-up
        iv) Clarify
        v) Scheduled
        vi) Agendas (one for each person I meet w/ regularly)
2) How To Do Things by David Cain:

a) Simple pomodoro method
b) Each pomodoro is a Block
c) Use a Right Now List to keep you on track or clarify next steps

Creating an alter-ego

This is a concept that performance coach Todd Herman writes about in his book, The Alter-Ego Effect (tk link). The core concept is this: create a character in your mind that acts the way you want to act, thinks the way you want to think, and performs the way you want to perform.

Then create a ritual for transforming into that character.

If you do, you will now act, think and perform the way that character does: which is an idealised version of how you want to show up at work.

I highly recommend reading the book, or check out this podcast interview with Todd Herman.

Email batching

Having your email inbox open all the time is a recipe for disaster and distraction. Instead, answer emails in batches at set times of the day.

Batch as frequently as necessary, as infrequently as possible. Close your email inbox in between when you are not batching. This is worth doing even if it means doing more with pen and paper, which is actually much easier than you think and often easier than reading things on screen.

Morning journaling

Creativity faucet idea, morning pages, let the shit get out of your head and onto the page. Misperception that this is just for creatives -- it's not. As a knowledge worker, the quality of your thinking is a huge part of the value you generate.

Protecting the asset (that's you)

Sleep 8 hours a night. Lift weights. Eat reasonably. I personally go for the Faileo diet (ty Naval), which is an approximation of the Paleo diet that I fail on repeatedly -- I'm not strict about it -- but it gets me closer to paleo principles than making no effort whatsoever.

Most important task

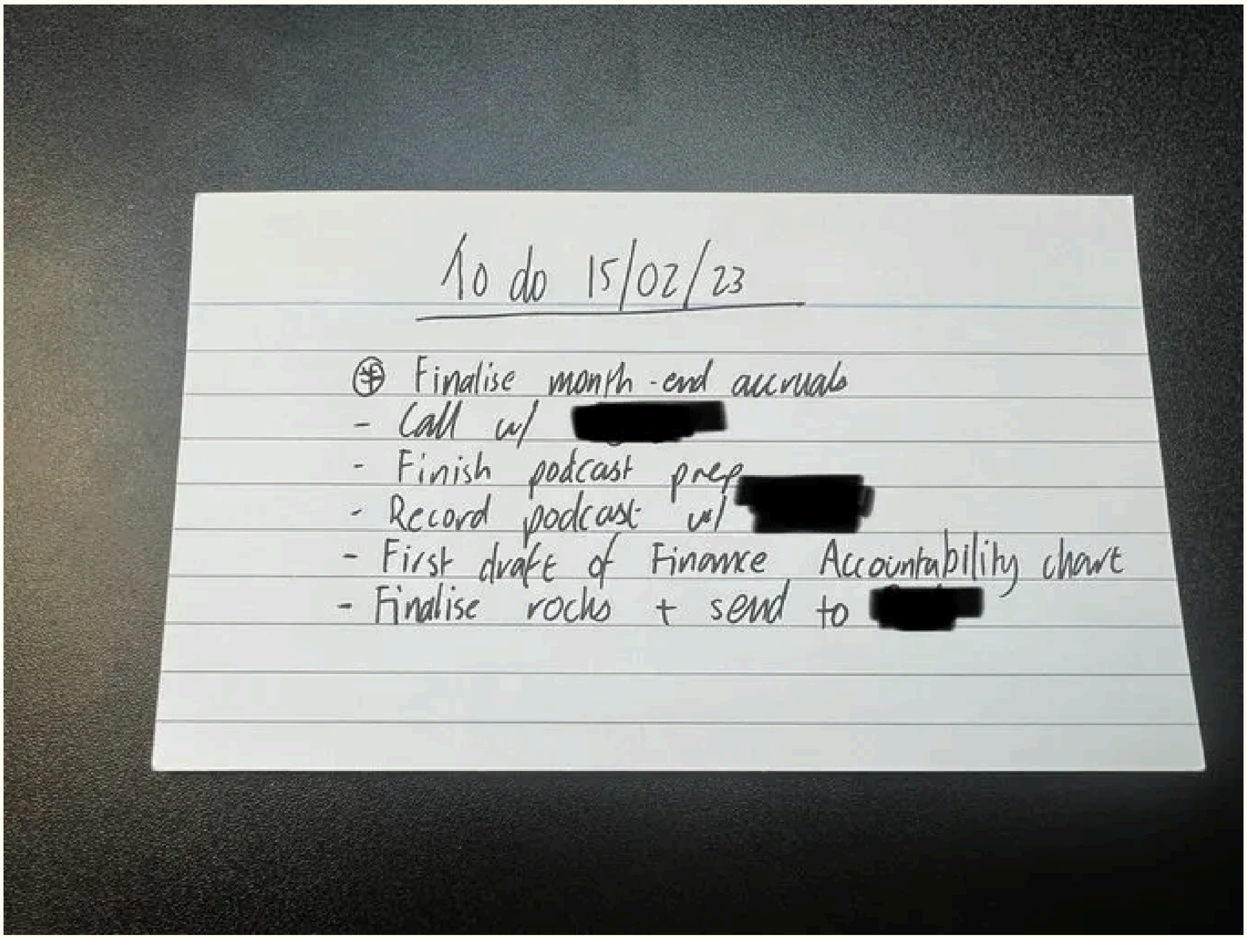
Every day, identify what the most important thing is that you can do that day. Then block out time to do it. Then start doing it, and don't stop until it's done.

Productivity experts call this The Ivy Lee Method:

"At the end of each day, write down the most important things you need to do the next day. Do not write more than six items. Rank the items from most important to least important.

When you arrive at work the next morning, start work on item one. Work only on this until it is done. Then, move on to the second item. Work only on this until it is done. Then, move onto the third item, and so on. At the end of the day, if any items are not done, add them on tomorrow's list — keeping the total *number of items at no more than six. Repeat this process every working day, forever.”*

I use a version of this that I adopted from [Ryan Holiday](). I use a simple 3x5 index card, which I usually fill out either the night before, or first thing in the morning when I arrive at my desk.



This has a few benefits:

1) It limits the size of the to-do list.

I actually can’t fit much more than 6-8 things on it. It’s a way of forcing myself to prioritise what is actually important for any given day, as opposed to digital to-do apps that can literally hold an infinite number of items.

2) It's a physical reminder.

This index card sits on my desk, acting as a tangible, visible, inescapable reminder of what I need to focus on. Again, contrast that to an app or your phone or computer that you can close or tab away from at any time — then those to-dos are out of sight, out of mind. If I'm on the go, I carry this round with me, either in my pocket or in my notebook, all day, until…

3) You get to rip it up when you're done

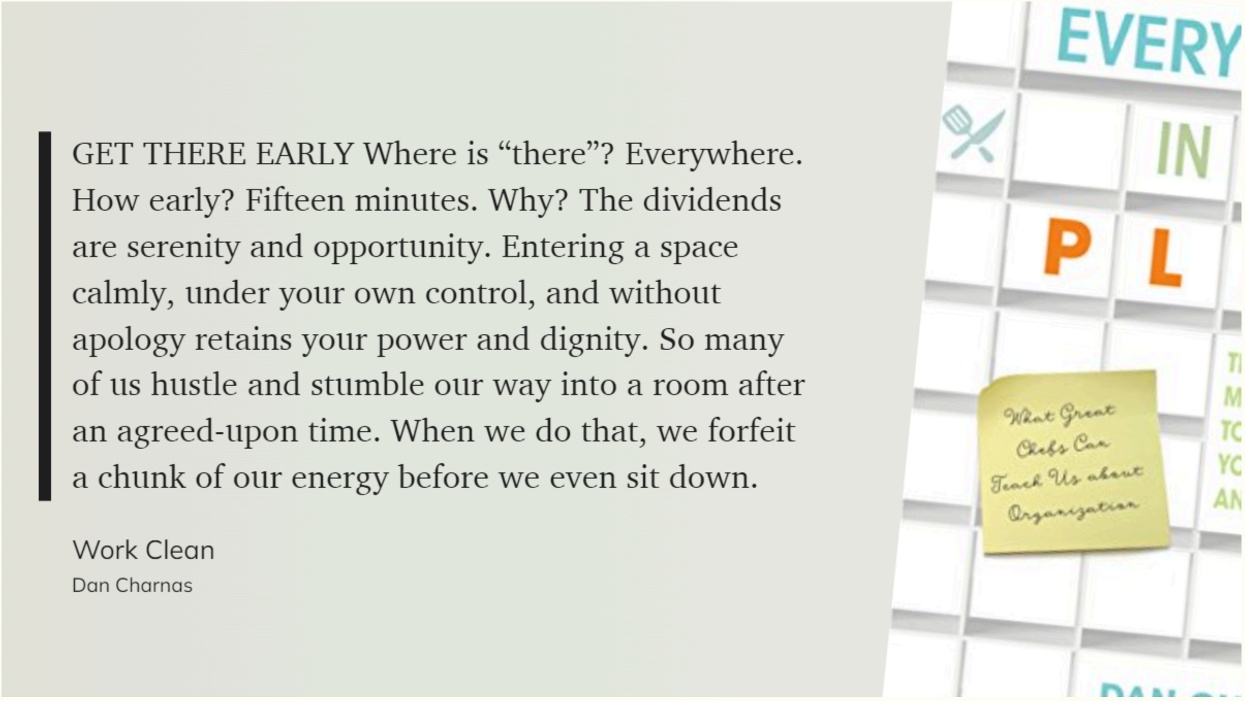
As I'm working through the items one by one, I'll cross them off, which brings me a great amount of satisfaction. And the real joy is in completing the last item on the list, at which point I tear up the card into tiny pieces, and throw it away. That ritual is my way of telling myself that I've had a good day, that I've achieved what I needed to, and the rest of the day is mine to spend as I wish.

I love this system — it's simple, cheap and effective. I highly recommend it.

For more on the power of the umble index card, [this article by Ryan Holiday] is wonderful for creatives.

Be on time (or early), all the time

From Dan Charnas's great book, Work Clean:



Working in a company

Internal communication

There are about 5000 ways of communicating internally -- and internal communication is one of the most important things to get right as a company. Done correctly, everyone feels connected, aligned to the mission, and in the loop about what’s going on. Done poorly, people feel resentful, marginalised, siloed, and like everyone is pulling in a different direction to them. The former creates phenomenal benefits; the latter creates huge, but unseen, costs.

So how do you do internal communication correctly? The answer is: take a lot of time on it, and do it a lot.

There are no free lunches here. No quick easy fix. You just have to accept that you need a huge investment in internal comms at around 15-20 people or so (based on having worked in 10 person companies that basically needed none of this and were fine, and 60 person companies that had none of this and were complete shitshows).

Meetings

Meetings have a terrible reputation, but they are a necessary part of life, even if your company is almost entirely async or remote.

One-to-ones

You should have one-to-ones with your direct reports every week, two weeks, or every month, depending on the volume and importance of things that need your direct input. When I'm managing a team where a large percentage of their work is repeatable processes, one-to-ones can be done every two weeks or every month; in a team with lots of high-profile, one-off work, every week is necessary.

This is linked to what Andy Grove calls the job-relevant maturity (JRM), or task-relevant maturity (TRM) of the person in the role. The greater the JRM or TRM, the less frequent you need one-to-ones.

[tk The Effective Manager has data on this too]

Team meetings

You should have a regular team meeting -- depending on the size of your team, your physical proximity (e.g. fully remote, across 1-2 sites, or all in the same office space), this might take the form of a daily huddle, a weekly catch-up, or a monthly

Internal comms methods

The method of communicating should match the urgency and specificity of the message, as indicated by the handy 2x2 matrix below.

	Urgent	**Non-urgent**
Of general interest **or** **simple**	Text message	Teams / Slack
Not of general interest **or** **complicated / detailed**	Phone call	Email

To take the urgency piece a little further:

- Interrupt if there's fire or blood
- Text if you need a 2-hour response
- Email if you need response by end of day
- Put it on the regularly scheduled meeting agenda if it can wait till then

Trust battery

Good actions charge the trust battery

Bad actions deplete it

More on this from Tobi Lutke in his interview on The KNowledge Project podcast (tk insert link)

Process improvement

Ari Meisel [tk insert link here] has a simple three-step framework for process improvement:

1. **Optimise**
2. **Automate**
3. **Outsource**

The reason to follow it in this order is because, to paraphrase Tim Ferriss: you should never outsource anything that can be automated, and you should never automate something that can be either streamlined, or eliminated altogether. People are messy: they want pay rises, they call in sick, they take breaks, they forget things, and they leave to go to other companies. If all that is true, then in the time they are available, I want them to be working on the highest impact things possible, and not wasting a single moment on low-value busywork.

So following these steps in order means:

- simplifying a process as much as possible
- automating any steps that can be automated
- outsourcing what remains to someone else

The end goal here is to have as few steps as possible be done by a person -- and for that person to be someone other than you. Your time should be freed up for the highest leverage task possible (which is usually growth, hiring, or product).

1. Optimise

The goal here is to get your process down to as few steps as possible, and to have those steps be crystal clear. This is because we want to either automate or outsource the fewest steps possible.

First, ask yourself: why do we do this? What value is this process generating?

Right off the bat, you might find some things can just be eliminated altogether because no-one needs them anymore, or they don't generate enough value to be worth doing. You'd be amazed at the number of processes that get done 'because my predecessor used to do it.' It's a lot.

If you're not sure whether you can stop doing something, just stop doing it as a trial period for a couple of weeks, and see if anyone notices. If they do, no harm done -- just apologise, and start doing it again. Ask your boss's permission for a "2 week trial" if you need to.

If it's a process you have to do, then here's how to optimise it.

First, think back to the question you asked on the value the process generates. The other reason for considering this is to think whether there's a simpler, easier, quicker way to generate that same value.

For example, say you produce a weekly report on sales figures by region for a few managers. What do those managers actually get out of it? What do they use it for?

If the answer is "I like to stay up to date on the overall sales numbers" then maybe you can just do an overall weekly update, without having to split it down by region. If the answer is "I use it to check on how our Southern region team is performing" then maybe someone in that region already does some reporting that they can just cc this management team on. The point is that it's only through talking to your end users that you figure out what the real benefit is of your process.

Next, assuming you do need to produce the same end product as is, then you need to go through that process and write it out as you do it. Then hand it to someone else and have them follow your instructions while you watch.

Two things happen:

1. As you document the process, you'll notice you're doing things a clunky way, and you can fix it there and then (and document the new refined process).
2. While they're attempting to follow your instructions, the other person will stumble in places where those instructions aren't clear. Or you'll notice them taking ages to do something and realise there's a much simpler way around it.

Eliminate the steps you can, and simplify or make clear anything that causes stumbles.

2. Automate

No-code tools like Zapier and Power Automate mean that you can usually automate away common tasks like:

- copying and pasting data
- updating spreadsheets
- follow-up emails

Even if you don't know any programming at all. Using just built-in functionality in Microsoft, you can easily:

- Set graphs to automatically update with the latest data at the click of a button
- Create mail rules in Outlook to move information to the right place
- Format sheets so that formulas update automatically when you drag them across

None of this is technically difficult, but it requires you to question what you're doing and why, and if there's an easier way to accomplish that goal. Tools like Zapier and Power Automate do require some time investment to become familiar with, but they have a relatively user-friendly interface. If you can do stuff in Google Docs and Google Drive, for example, you should be able to figure out Zapier or Power Automate.

If you are willing and able to (learn to) code but don't know where to start, the book *Automate the Boring Stuff with Python* is an excellent resource.

Once you start using this lens, you'll see automation opportunities everywhere.

For inspiration check out Ari Meisel's book Idea to Execution, where Ari creates an almost entirely automated business in just a couple weeks. It's pretty incredible to watch.

3. Outsource

The good news is that if you've done the first couple of steps right, this should be easy, because:

a) you've already got process documentation from step 1

b) you're left only with that which cannot be eliminated/automated

So all that's left to do is assign this work to someone, either in your own company, or to a VA or freelancer.

I'm no expert on the latter but others have written about this more -- check them out.

I like to make sure all process docs have 4 sections:

- purpose
- pe-requisites

- trigger
- the actual steps

The reason for the purpose is to act as the 'commander's intent', the north star for what we're trying to achieve with this process. It means that others can build on and refine what I've done, while still keeping the end goal in mind.

Pre-requisites mean things get done in the right order.

Triggers mean things get done at the right time.

The actual steps mean things get done in the right way.

Areas of responsibility

You also need to document who's responsible for what things, and on what cadence.

Matt Mochary's book The Great CEO Within has more on this, but the ideal framework is [Areas of Responsibility (AORs)], which look like this:

Department	AOR	DRI	Backup
Finance/ Legal/Admin	Develop and maintain monthly financials	Marlo	John
	Develop and maintain financial forecast	Marlo	John
	Manage expenses with Expensify	Marlo	John
	Train all new team members with department-specific onboarding	Marlo	John
	Manage bill payments with Bill.com	Marlo	John
	Track and claim accounts receivable	Marlo	John
	Manage payroll with Gusto	Marlo	John
	Develop and maintain insertion order and influencer statements of work	Marlo	John
	Develop, sign, and maintain legal documents including incorporation documents, insurance documents, tax forms, etc.	Marlo	John
	With help from People Ops, conduct all offboarding meetings for department members	Marlo	John
	Handle office insurance, utilities, and related documents	Marlo	John
	Keep reports of employee computers and department budgets	Marlo	John
	Ensure HR compliance: Zenefits, internal HR spreadsheet, handbook	Marlo	John
	Manage company events	Marlo	John
	Keep track of team@company.com	Marlo	John

Notice how each department's tasks are grouped together, the task is succinctly described, and there are both a main person responsible for the task and a backup person. This infrastructure ensures no task falls through the cracks because people thought it was another person's responsibility.

similar to ... One?

Document these somewhere like Notion. (Peter Lohmann has [this excellent video]() on how to use Notion at your small business.)

Underneath each AOR, link to all the relevant process docs so that you have a library of AORs and associated processes. Congrats, you're now documented.

Lastly it's up to you as a manager to decide how often to do process audits to make sure your processes are being followed.

As a general rule, the more frequent the process is run, and the more critical the process, the more you should audit it.

Once your business is fully documented, there are two amazing benefits: scalability, and saleability:

- The business is more scalable (onboarding is easier, fewer things require hiring)
- The business is more saleable (requires less of your input, less key person risk)

Which means that although process documentation and optimization can seem boring, it's actually one of the highest leverage uses of your time as an entrepreneur or business owner.

People management

Hiring and managing

Right person, right seat is the frame you should have in mind. This is the framework from Jim Collins' book Good to Great, adopted by the EOS framework.

- Right person: do they fit with the values of the company?
- Right seat: do they get it, want it, have the capability to do it?

You're looking for yeses across the board with those. It is usually better to have no one in a seat than the wrong person in a seat.

Interviewing

I've heard topgrading is good, although I've never used it.

Main thing to think about when hiring: what are the skills, qualifications, attributes, and experience that you want in this person? Then structure your interview to find out specific examples of when they have demonstrated those things.

Key is to find out what specifically that person has done. Probe past "the team did..." or "we did..." -- you can ask e.g. for the person to explain in detail how something worked. If they were really deeply involved with it, they'll know the details. If they can't explain it in detail, it means they were probably on the periphery of it (at best), or were just there when it happened.

Onboarding

Great framework here: https://www.christinecarrillo.com/blog/how-to-create-an-onboarding-machine

Two phases:

- Foundation Building
- Operational Immersion

1) **Foundation building**
    a) Over-Communicate What To Expect, e.g.
        i) Day 0: Welcome To The Team
        ii) Day 1: Sign New Employee Forms Digitally
        iii) Day 7: Meet The Team & Onboarding Schedule
        iv) Day 14: What To Expect Your First Week

v) Day 18: Scheduled Lunch Dates With Your Peers
vi) Day 20: Set up Gmail, Notion, and Slack so they can start to "observe" before their first day
vii) Day 24: Individual Intros To Peers
viii) Day 27: Your First Day
ix)

b) Accelerate Relationship Building
c) Outline Clear Job Expectations: The First 90 Days

2) **Operational immersion**
   a) Company mastery (week 1-2)
   b) Shadowing (week 3-4)
   c) Doing and fine-tuning (week 5-6)

Coaching

A good framework for coaching your direct reports or mentees is the GROW method.

- Goal
- Reality
- Options
- Way forward

Ask open questions. Probe. Resist giving the person the answers unless they really can't see it. To get someone talking, you can just keep asking, "what else?" after every response, until they finally say, "No, that's it."

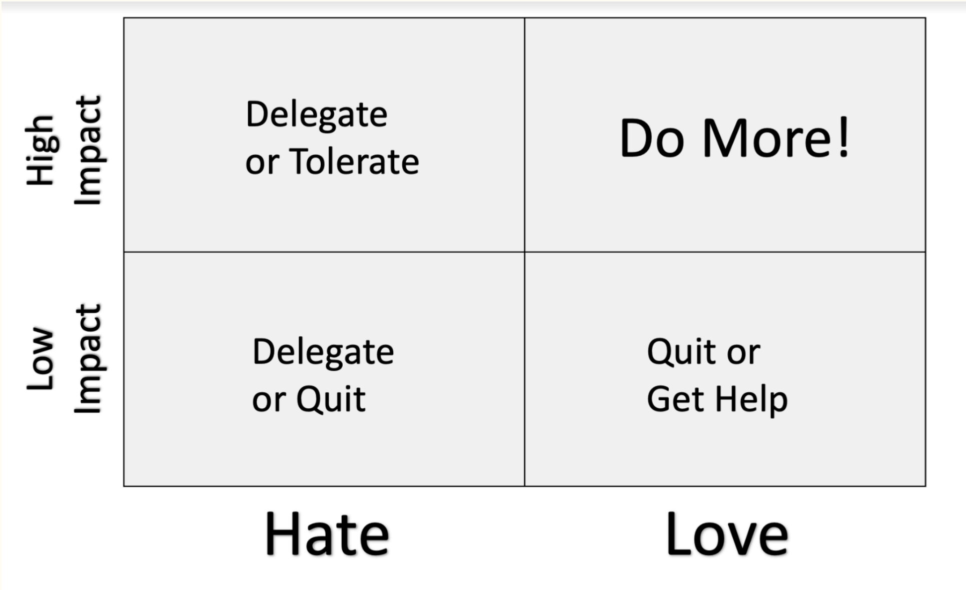
Skill-will matrix

Helps you identify the best management strategy to take with someone, depending on where they fall on the skill-will matrix. Based on Andy Grove's idea that if someone isn't doing their job effectively, they either can't (skill) or don't want to (will).

Source: https://www.aihr.com/blog/skill-will-matrix/

Effective delegation

Via Michael Girdley:



When it comes to delegating specific tasks, I've found this to be quite a useful way of passing on the instructions (usually I'll talk this through in person or on a call, then send this as an email follow-up as a reference for the person):

1. **Purpose:** the point of this is A, B, and C (e.g. the 'Commander's Intent' which gives them a north star to guide them when they face decision points)
2. **Output or end result:** specifying what 'done' and 'good' looks like
3. **Inputs:** what will need to go into doing that task: you'll need this data, read this article, speak to this person
4. **Constraints:** e.g. you can't spend more than $x, or you have to create a deck with no more than 10 slides, etc.
5. **Next steps:** usually defining a check-in point, e.g. "Have something ready for us to review on Thursday afternoon, and I'll schedule 30 mins for us to review" or "email me in 24 hours to let me know what progress you've made by then."

Leadership

The difference between management and leadership is hard to define -- for now, let’s call ‘people management’ the nuts and bolts of managing individuals or a team. ‘Leadership’ is how you define an organsiation’s goals, inspire your team to achieve them, and create the frameworks for good things to happen in your org.

Leadership priorities

Patrick Lencioni outlines this framework in his excellent (and short) book *The Four Obsessions of an Extraordinary Executive*. Those four obsessions are:

1. Build and maintain a cohesive leadership team
2. Create organisational clarity
3. Over-communicate organisational clarity
4. Reinforce organisational clarity through human systems.

By organisational clarity, Lencioni means that everyone in the company fully understands your company’s:

- identity
- strategy
- values
- mission
- major goals
- objectives
- roles and responsibilities

Over-communicating means that once you've created clarity on all of these things, you must drill it into your team, constantly, in every possible medium.

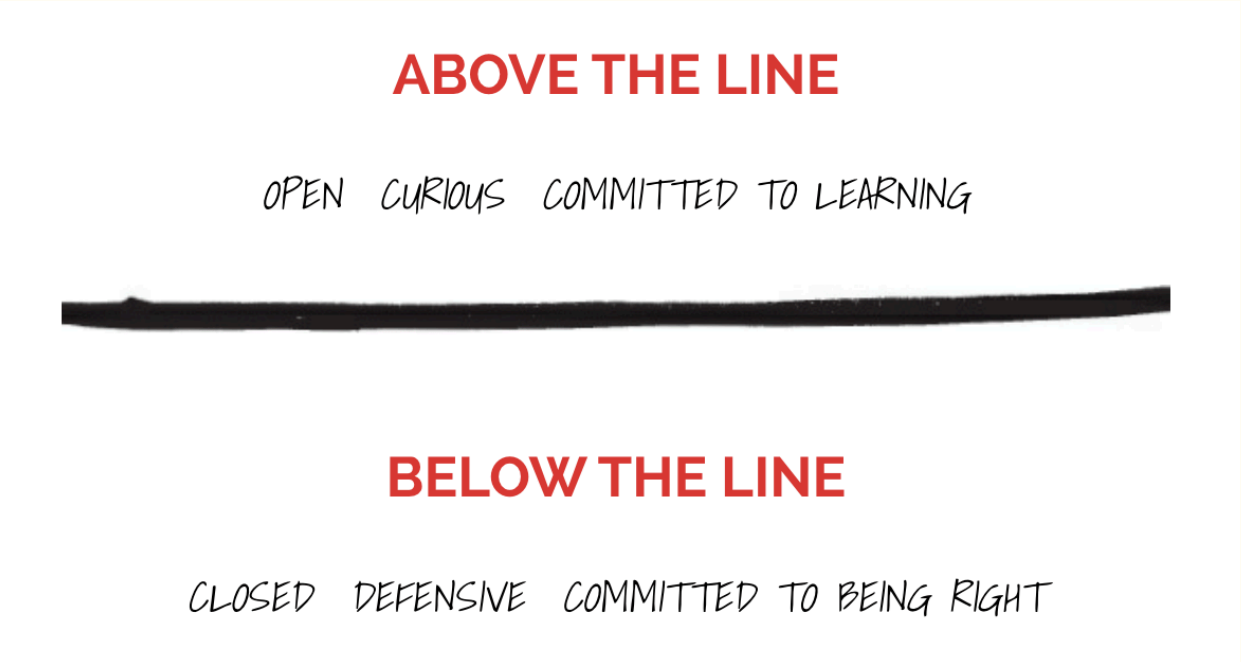
The point where you think you're over-communicating is the point where it's starting to sink in with your team. Keep going.

Reinforcing clarity through human systems means that your processes for hiring, performance management, rewards and recognition, and dismissal are all linked to your values

People who fit with the org's values stay and get promoted. People who don't, leave (one way or another). (See Right Person, Right Seat.)

Conscious Leadership

Taken from The 15 Commitments of Conscious Leadership: framework of ‘above the line, below the line’ leadership:



Great leadership is above the line.

The whole book is worth reading, but the first two commitments of conscious leadership are the foundation on which the other 13 are built. Those two commitments are:

1. **I commit to taking full responsibility for the circumstances of my life and for my physical, emotional, mental, and spiritual well-being. I commit to supporting others as they take full responsibility for their lives.**

2. **I commit to growing in self-awareness. I commit to regarding every interaction as an opportunity to learn. I commit to curiosity as a path to rapid learning.**

(You might notice that commitment #1 is essentially the same as 'extreme ownership' as defined by Jocko Willink and Leif Babin -- I think they're the same concept, which is an incredibly useful one.)

The first 90 days

Cam Herold's excellent advice for your first 90 days in post -- he meant this for COOs but it applies to searchers, acquirers, and new leaders of all stripes:

> *Okay so let's get the first 30 days out of the way.*
>
> *Walk around the company with a notebook. And write down ALL the things you want to change… but the key is* **don't do any of them.**
>
> *Carry the notebook everywhere because you never know when you might see something that you want to change.*
>
> *You should also spend the first 30 days meeting everybody. Go for lunches, coffee, zoom meetings, etc. Get to know everyone.*
>
> ***Once you've done that in the first 30 days, then you spend month 2…***
>
> *… testing your hypothesis on each of the items you wrote in your notebook.*
>
> *And as you test each item on your list, you'll naturally end month 2 with a prioritized project/task list to begin implementing in month 3.*
>
> ***In month 3, start on the projects you've written down but…***

... do the easy wins first. Do the ones that don't take people, time, or money.

And once you have a few of those wins under your belt, you can move to the bigger projects that will require more effort. That will require people, time, or money.

Now if you've been a COO for 6 months or longer - here's what I want you to do.

Find your most recent hire in the operations team...

And ask them to do this ***for you...***

Say something like this

"Hey [Name], would love to get your help on something. I've been at the company for a while and sometimes what happens is we have operational blinders on. As the newest member of the team, you don't have the same biases and blinders that I do. So I have a new assignment for you. For the next 30 days, I want you to view the company as if you were the COO. And write down in this notebook everything you'd improve. Don't worry about whether the ideas are good or bad or meh. If you think it, write it."

The key is to find someone who doesn't have the same biases or blinders that you might.

Business transformation

There's a phenomenal post by Permanent Equity called Table Stakes that helps you assess the five core areas of your business -- operations, marketing, people, finance, and tech -- and identify areas for improvement.

Highly recommend the whole post, but here's the checklist of questions to ask yourself about your business:

Operations

Core business process

- Do you do what you do well?
- Do you do it well consistently?
- Do you do it well consistently and profitably?

The org chart

- Do you have roles?
- Are those roles defined?
- Is there a clear decision-making framework and/or hierarchy?

Planning

- Do you have a prioritized list of what you want to do next?
- Do you talk to your customers on a regular basis?
- Can and do your customers recruit other customers?

Finance

Accounting

- Do you know how much money you do or don't make?
- Do you manage your costs by category?
- Do you manage your cash conversion cycle?

Tax

- Are you accurately accruing for and paying them?
- Are you working to reduce them?
- Do you know what potential benefits are available to you?

Finance

- Do you have a forward-looking forecast grounded in realistic assumptions?
- Do you have a process for how to decide to make or not make an investment?
- Is your capital structure optimal?

People

Compensation

- Do you pay a fair wage that is commensurate with an employee's workload?
- Do you offer competitive benefits?
- Do you have a thoughtful incentive plan?

Recruiting and retention

- Do you have a hiring process that attracts multiple candidates for each job opening?
- Do you know who is doing a good job and do they know if they are doing a good job?
- Do the people who do a good job tend to stick around and get increases in responsibility?

Culture

- Do your people come to work?
- Do your people like to come to work?
- Do your people actively recruit their most talented friends to come to work with them?

Marketing

Operations

- Do you have a website and working phone number?
- Do you rank on Google?
- Do you actively target potential customers?

Assets

- Do you have a logo, brand, and high-resolution examples of your work?
- Do you have access to professional copywriters and designers?
- Are you actively running and measuring marketing tests?

Strategy

- Do you know how well your marketing is working?
- Can you measure the ROI of your marketing spend?
- Can you confidently spend more on marketing?

Technology

Systems

- Does technology facilitate your work?
- Is your technology up-to-date?
- Are you regularly updating your technology?

Processes

- Can you outline a standard business process?
- Do you consistently streamline and improve that standard business process?
- Are you actively adopting new technology to aid your business process?

Strategy

- Do you have a process for identifying gaps in your tech stack?
- Are you able to smoothly integrate new technology?
- Can you confidently spend more on technology?

Change management

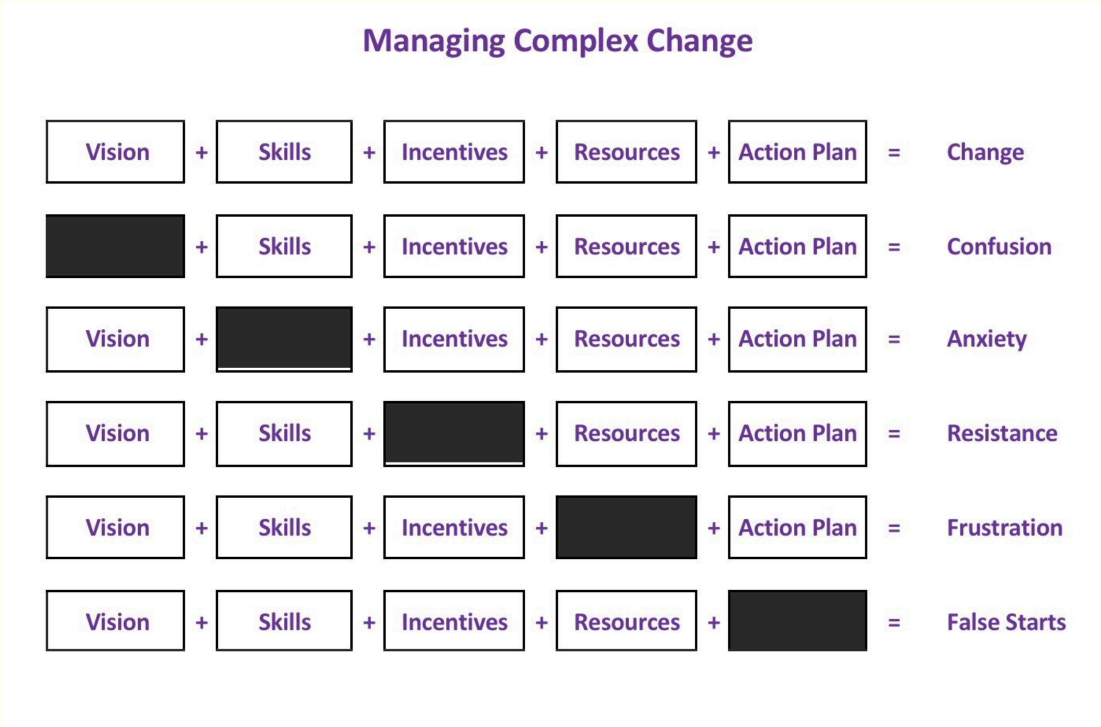
Unfreeze, change, refreeze model via Lewin

Unfreeze: get buy-in, talk about the need for change, share the vision about where you're getting to and how it'll help the company

Change: do the actual change

Refreeze: create stability through new org structure, new roles and job descriptions, new SOPs and process audits, celebrate the change and the wins and successes that the change has brought about

When managing complex change, you need all five of the things below -- in the absence of any one of them, you won't get to where you need to be.



Finance

Obviously I have a bunch of thoughts about Finance, having worked predominantly in Finance functions in my career. Here are some great resources I've assembled.

Financial Planning & Analysis

Secret CFO publishes a wonderful newsletter called CFO Secrets. He did a 6 part series on FP&A which you should check out -- I've assembled it into one doc here. It's 87 pages and 15,000 words of goodness.

Data analysis

Ergest Xheblati
@ergestx

There are four fundamental questions that data allows you to answer about your business:

1. What’s happening in the business now? (Basic reporting and metrics)
2. Why did it happen? (Root cause analysis and theory construction)
3. What's going to happen? (Forecasting and what if scenario analysis)
4. What should we do next? (Finding leverage points, opportunities and growth levers)

How many of them can you confidently answer?

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