



## Plan, Position, and Propel Your Business to New Heights

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Presented by:  
Leo Sheridan, CEO  
Advanced Group

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## Agenda

- Brief Intro to Advanced Group
- Setting Strategic Plan & Vision
- Aligning Structure & Cultivating Operational Excellence
- Developing a High-performance Culture



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## Businesses @ Advanced Group

Four businesses, supported by an exceptional Shared Services team



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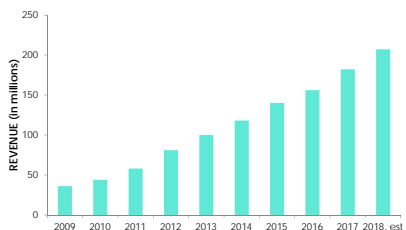
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## Revenue @ Advanced Group



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## Offerings @ Advanced Group

Staffing Services	Outsourcing	Workforce Business Solutions
<ul style="list-style-type: none"> <li>• Clinical Research</li> <li>• Validation/Quality</li> <li>• HR</li> <li>• Accounting/Finance</li> <li>• IT</li> <li>• Healthcare (non-clinical)</li> <li>• Office Support</li> <li>• Marketing/Creative</li> </ul>	<ul style="list-style-type: none"> <li>• RPO</li> <li>• CRO</li> <li>• FSP</li> </ul>	<ul style="list-style-type: none"> <li>• Managed Staffing</li> <li>• payPRO Payrolling Solutions</li> <li>• Workforce Management Consulting</li> </ul>



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## US Locations @ Advanced Group





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## Setting Strategic Plan & Vision



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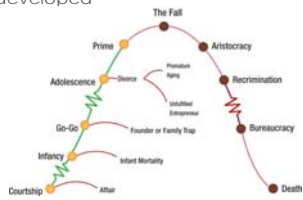
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## Creating the Context

Corporate Life Cycles

Taken from material developed by Ichak Adizes



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## Stages of Growth

- What stage are you in?
- What do you need to do to get to prime?



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## What's Your Why? Mission, Vision, & Values

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## Creating the Foundation

- What is your reason for being – why do you exist?
- What is the purpose of your organization?
- What does your organization do that really matters to customers? To employees?
- If your company ceased to exist – what would be lost?
- If you had all the money in the world, what would keep you coming to work?



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## Ask Yourself...

- What are the 4-5 values that we believe in and will not waver on?
- Why are these important to you?



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## What Behaviors Matter

- What are the behaviors that you need from yourself and others to deliver on the purpose?
- How do you see your values acted out every day?
- If you say you believe in World Peace but don't act on making this happen – is it really a value for you?



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**Mission**  
By placing our team, clients, and associates first, every day we make a difference.

**Vision**  
To be the most respected firm in our industry.



**R** Ensure deep Respect for people

**E** Promote a consistent culture of Excellence

**A** Be Accountable

**L** Demonstrate Leadership in all that we do




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### Strategy, Vision

- Where are we going and how are we going to get there?
- There are many ways to operate a staffing business – pick one and focus.
- HBR Article – 5 questions every CEO should ask
  - What does not fit?
  - What would an outsider do?
  - Is my organization consistent with my strategy?
  - Do / understand why we do it this way?
  - What might be the long term consequences?




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### Strategy @

- Middle-market professional staffing services
- High-end mission critical skill sets
- Multiple markets
- Strong operating margins
- Scalable platform
- Move up the food chain – build consulting capabilities

**How do you set up the organization to execute on the strategy?**




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**Aligning Structure & Cultivating Operational Excellence**



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**Structure follows Strategy**

- Structure – how do you set up your business to execute on your strategy?
- If your business is high volume low margin – you will need to build a low cost delivery model. What would that look like?
- If your business is high touch, high margin – what would that look like?
- AGC – local selling Branch Manager Model



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**Organizational Health**

- Build a cohesive leadership team
- Establish clarity among leaders
- Communicate that clarity to everyone within the organization
- Put structure in place to reinforce clarity



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"If someone were to offer me one single piece of evidence to evaluate the health of an organization, I would want to observe the leadership team during a meeting."

Patrick Lencioni



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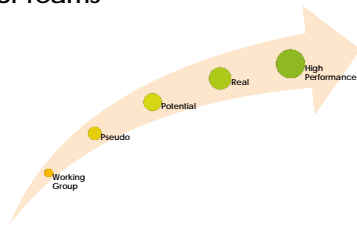
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### Definitions of Teams



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### High Performance Team

- Equally committed, mutually accountable
- Committed to personal growth and success
- Commitment transcends team
- Outperforms expectations
- Excellent model



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## Structure of Team

- Purpose
- Direction
- Measurement
- Objectives
- Actions
- Meetings
- Ground rules



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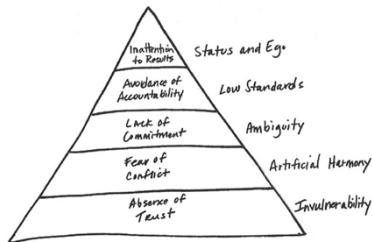
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## 5 Dysfunctions of a Team - Lencioni



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## Executive Team @ Advanced Group

- CEO, CFO, COO, CHRO, Presidents
- Most important team in the organization
- Team's focus on performance - cascades throughout organization
- Meet every Wednesday at 9am
- Focus on goals and priorities
- Each leader owns one of the corporate goals
- Report updated prior to call to keep each other accountable



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## Leadership

- Executive Team: drives delivering results of the key goals
- Leader/Managers are where the rubber hits the road
  - Difficult role - train, motivate, mentor, manage, sell, recruit, hire, fire
  - As growth occurs, reliance on middle management is critical
  - Training and development here is mandatory
- Desire to be a truly great operator
- Systems and processes working together to achieve organization's goals



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**"Everyone needs to be a strategist AND an effective manager."**

**"Strategy and managerial competencies are equally important."**

Harvard Business Review  
*September-October 2017*



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## Strong Managerial Competencies

- Better managed firms:
  - are more profitable, faster growing, less likely to die
  - attract talented employees, and foster better worker well-being
- Achieving managerial competence takes effort
- Achieving operational excellence is a massive challenge
- Family run firms tend to have weaker management



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## Core Managerial Processes

Operations Management	Performance Monitoring	Target Setting	Talent Management
<ul style="list-style-type: none"> <li>• Use of lean</li> <li>• Reasons for adopting lean processes</li> </ul>	<ul style="list-style-type: none"> <li>• Process documentation</li> <li>• Use of KPIs</li> <li>• KPI reviews</li> <li>• Discussion of results</li> <li>• Consequences for missing targets</li> </ul>	<ul style="list-style-type: none"> <li>• Choice of targets</li> <li>• Connection to strategy</li> <li>• Targets cascade down to individual workers</li> <li>• Time horizon</li> <li>• Level of challenge</li> <li>• Clarity of goals and measurement</li> </ul>	<ul style="list-style-type: none"> <li>• Talent mindset at the highest level</li> <li>• Stretch goals</li> <li>• Management of low performance</li> <li>• Talent development</li> <li>• Employee value proposition</li> <li>• Talent retention</li> </ul>




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## Creating Execution & Operational Discipline




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## Planning, Goal Setting, Execution

- Constantly focusing on improving the business
- Go into each year with a solid plan

August	<b>Start goal setting process</b> <ul style="list-style-type: none"> <li>• What have we accomplished this year?</li> <li>• Are there goals that need to stay front and center going into next year?</li> <li>• Moving on to new priorities?</li> </ul>
September	<b>Revenue and net income numbers determined largely by CFO and CEO</b> <ul style="list-style-type: none"> <li>• How fast do we want to grow?</li> <li>• What's the appetite and capacity for investment?</li> <li>• What are our financial goals?</li> </ul>




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## Planning, Goal Setting, Execution

<b>October</b>	<b>Finalize Corporate Goals</b> <ul style="list-style-type: none"> <li>Corporate goal planning meetings with senior leaders to get feedback</li> <li>Complete meetings by 10/13, finalize corporate goal structure by 10/31</li> <li>Deliverable: corporate goals "placemat"</li> </ul>
<b>November</b>	<b>Finalize plans</b> <ul style="list-style-type: none"> <li>Cascade goals to leadership in each BU - work on plans to execute in their business</li> <li>Comp and bonuses determined</li> </ul>
<b>December/January</b>	<b>Share with employees at All Staff kick-off meetings</b> <ul style="list-style-type: none"> <li>Each employee has individual plan to know what will make them successful</li> <li>Determine Ovation's trip location for the following year</li> <li>Finalize any changes to criteria by 12/1</li> </ul>




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## The 5 Buckets

Execution across each area has to happen at the same time because they are all inter-related.




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Advanced Group 2018 Strategic Plan Summary				
VISION		REAL VALUES		
By placing our team, clients, and talent first, every day we make a difference.				
To be the most respected firm in our industries.		Respect: Ensure deep respect for people Excellence: Promote a consistent culture of excellence Accountability: Be accountable Leadership: Demonstrate leadership in all that we do		
STRATEGIC PRIORITY	2018	2019	2020	PROFITABILITY
<b>PEOPLE</b>	People first: Create excellence in people practices that foster engagement and learning and allow us to attract and retain the best and brightest.	Drive innovation and excellence in staffing and solutions to gain competitive edge in our markets.	Continue our journey towards operational rigor, efficiency, and commonality in all of the processes that support sales, recruitment, and operations.	Achieve a healthy profit position in 2018 while establishing a discipline for the future that balances investing in growth with results.
<b>KEY METRICS</b>	Turnover % Productivity (OP or Revenue per FTE) † Engagement 1 to 4.5 Internal mobility †	Total Clients Billed † Total New Revenue † AG Cross Selling † NPQ/Client Satisfaction †	Compliance † Specialization † Technology Tool Optimization †	EBITDA % † Profit vs Budget GM% †
<b>INITIATIVES</b>	1. Develop and deliver best-in-class advanced sales and recruiting training 2. Create high performing leaders through leadership development training, servant leadership competencies and engagement planning 3. Develop career paths across AG 4. Develop and implement onboarding model for new employees speed-to-productivity	1. Design the sales process of the future to include automation, lead gen, and digital marketing strategies 2. Define and launch talent engagement strategy 3. Define and launch client satisfaction solution (ServiceHQ)	1. Establish "AG Way" business management strategy • Regular cadence of governance and business management activities at each level • Ensure our tools are the right ones & that they are leveraged appropriately 2. Analyze operational model to maximize efficiency in sales, recruiting, and operations	1. Establish BU profitability goalplans, establish, and consistent business reviews 2. Develop and deploy financial management infrastructure that increases discipline and fiscal responsibility
Deliverable spans both 19 and 20 Develop a project plan by LOB to enhance thought and brand leadership in each of our niches.				

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**Advanced Group 2018 Quarterly Deliverables**

Category	Deliverable	Owner	Timeline
PEOPLE	1. Develop and deliver best-in-class advanced sales and recruiting training	MF	Q1
	2. Create high performing leaders through leadership development training, servant leadership competencies and engagement planning	MF	Q1
	3. Develop career paths across AG	MF	Q4
	4. Develop and implement onboarding model for new employee speed-to-productivity	MF	Q4
2.0	5. Design the sales process of the future to include automation, lead gen, and digital marketing strategies	Marketing & RD	Q3
	6. Define and launch talent engagement strategy	LUMF	Q2
	7. Define and launch client satisfaction solution (SenseHQ)	SM	Q1
8/9/20	8. Develop a project plan by LOB to enhance thought and brand leadership in each of our niches	JR	Q1
	9. Establish AG Way business management strategy Regular cadence of governance and business management activities at each level Ensure our tools are the right ones & that they are leveraged appropriately	J. Jelinek	Q3
PROFITABILITY	10. Analyze operational model to maximize efficiency in sales, recruiting, and operations	JJ	Q1
	11. Establish BU profitability goalplans, dashboard, and consistent business reviews	JJ	Q1
	12. Develop and deploy financial management infrastructure that increases discipline and fiscal responsibility	PV	Q2




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**Clarity – Communication**

- Communication is the lifeblood of any system
- Keep results visible and transparent
- Over-communication is not possible




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**Internal Communications Plan**

- Connect employees to company goals and strategy
- Increase executive leadership visibility
- Educate employees on financials
- Foster cross-company collaboration
- People first
- Connect remote workforce
- Nurture REAL culture
- Promote CSR internally and externally




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**Cadence @**  **Advanced Group**

<p><b>Executive Team Meetings</b></p> <p><b>Frequency</b> Once a week, every Wednesday at 9am</p> <p><b>Purpose</b> Review progress towards goals, discuss priorities <i>*Executive team also holds four off-site meetings per year</i></p>	<p><b>White "Board Meetings"</b></p> <p><b>Frequency</b> Every morning in each business unit</p> <p><b>Purpose</b> Discuss day's priorities, who owns what <i>*Stand up meetings also take place mid-day and end of day</i></p>
<p><b>Management Meetings</b></p> <p><b>Frequency</b> Monthly</p> <p><b>Purpose</b> Review performance, hear from the leadership Leadership Summit twice a year</p>	<p><b>All Staff Meetings</b></p> <p><b>Frequency</b> Every other month</p> <p><b>Purpose</b> Rewards and recognition, communicate high-level messaging on key business happenings</p>



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**Communications Channels**

- VIBE
- All Staff meetings
- @workplace
- Grassroots: visuals in office
- HirEd
- Town hall concept
- Email
- MILO intranet
- Qlik weekly dashboards



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**Developing a High-Performance Culture**



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“Do not tolerate brilliant jerks. The cost to teamwork is too high.”

Reed Hastings  
CEO Netflix



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### A-B-C Players

- You control who works in your company
- Leverage the “people piece”
- Not about D and F players

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### C Players

- Mediocre
- Marginal performance
- Just get their jobs done, sort of...

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**B Players**

- Loyal
- Valuable
- Skilled
- Keepers



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**A Players**

- Have drive and focus
- Promotable
- Destined for leadership
- The rising stars



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**A-B-C's Exercise**

- Make a list of direct reports
- Grade
- Implications?
- Improve your team?
- Improve your organization?
- Share with a partner



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### Rigorous Hiring Practices

LOW 3 2 1 - + 1 2 3 HIGH

**Dominance** A

**Extroversion** B

**Patience** C

**Formality** D

LOW 3 2 1 - + 1 2 3 HIGH

© Predictive Index, LLC

THE INSTANT NEW YORK TIMES BESTSELLER

SOLVE YOUR #1 PROBLEM

Who's hiring the best? And the answer is not who you think. Hiring who you do is the most important competitive advantage you have for your business. Get it.

**Who**

GEOFF SMART AND RANDY STREET

© Wharton

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### Train and Develop SLII and Crucial Conversations

#### Crucial Conversations

How to engage in dialogue when the stakes are high, emotions run strong, and opposing opinions exist.

#### Situational Leadership

How to lead effectively by fitting your leadership style to the unique situation and employee's developmental needs.

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### What's My Line?

- Growth curve of a producer
- Know what's expected each day
- Own weekly KPI's and results we need to see from them

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## Up or Out




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## Engage




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## Rewards & Recognition @ Advanced Group

- Use employee feedback to drive rewards and recognition programs
- Exceptional performance recognized at All Staff Meetings every other month
- Employee of the Quarter program
- Annual Awards trip

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## Becoming a 10x CEO

- Starts with the CEO or President – focus on 3 things:
  - Develop a business model that works
  - Develop processes that makes sales easy
  - Focus on people
- Ask what your critical business drivers are to enhance your business model, process, and talent
- Spend the majority of your time focusing on these 3
- Then evolve and get management team to think the same way



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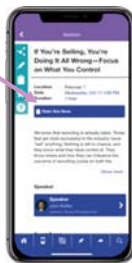
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