*Congratulations!*

**Welcome to Phenomenal Team Building – A Better Way to Pay!**

We will meet LIVE on Fridays, except for on November 19th, when we meet on Saturday. The Webinars run from 9:00 to 10:30 am central time.

October 28th, 2016

November 4th, 2016

November 11th, 2016

November 19th, 2016 – SATURDAY!

No Webinar Thanksgiving week

December 2nd, 2016

December 9th, 2016

All Webinars will be recorded and uploaded to the Better Way to Pay Community page. I’ll also be adding forms and tools each week for you to download and customize as you like.

We will spend 60 minutes on new content, review and assignments. Then, I’ll stay on the line for YOUR questions, success stories and challenges for an additional 30 minutes. I am here to help you create a sound compensation and bonus program, just-right for you and your team.

This is not a one-size fits all approach. I will share a solid philosophy, what to watch for and aim for, and I’ll share tactics that have worked for me and hundreds of clients and franchisees. Your job is to sift through the information and decide what will work for your company, and commit to implementation.

Throughout the series, there are benchmark accomplishments for you to achieve. This checklist will help you understand the scope of the program, and acknowledge your progress!

Sign and date as you complete these items. As needed, put appropriate dates on your calendar. Note that the coaching for these items will be part of the Webinar series and discussion. Don’t attempt to use this Checklist without having watched the Webinars. When it doubt, take time to clarify your intentions and actions. Email me, or participate on the Facebook page. The order of the items below is a suggestion, not essential.

People are sensitive about money and how they get paid. Be respectful, thoughtful and very strategic when you change compensation in any way. Communicate in private before you make any changes public.

* \_\_\_\_\_\_\_\_Put the dates of the Phenomenal Team Building – A Better Way to Pay! Webinars on your calendar.
* \_\_\_\_\_\_\_\_Pay Holiday bonuses like you did last year. Announce that in 2017 you intend to adopt an even better way to pay!
* \_\_\_\_\_\_\_\_Review this Better Way to Pay Checklist. You can edit and add to it as we progress. (I may, too!)
* \_\_\_\_\_\_\_\_Implement a wage “pause.” Consider 3-4 months.
* \_\_\_\_\_\_\_\_Commit (or recommit) to KFP – a Known Financial Position. Weekly, current and accurate Balance Sheet and P&L and Financial Quick Check report. Completed Month End Checklist by the 15th of the following month.
* \_\_\_\_\_\_\_\_Update your Budget and Selling Prices for 2017. You may choose to update throughout the Webinar series as you make decisions about the way you pay.
* \_\_\_\_\_\_\_\_Read “The Bare Bones Biz Plan” – BONUS! Have managers, prospective managers and other owners read it, too.
* \_\_\_\_\_\_\_\_Move Project to Top Project status and answer the What, Why, Who, By When, How Much and How questions. You lead the project, with help from a few team members.
* \_\_\_\_\_\_\_\_Schedule meetings for feedback and updates with team members who will be involved in, affected by compensation changes.
* \_\_\_\_\_\_\_\_Create, refine, update your Organizational Chart. Create Position Descriptions.
* \_\_\_\_\_\_\_\_Put names in Organizational Chart and identify current pay per position.
* \_\_\_\_\_\_\_\_Identify your Human Resources and Legal Team members, advisors. Throughout this process, seek their counsel.
* \_\_\_\_\_\_\_\_Customize and roll out the Employee/Employer Manual.
* \_\_\_\_\_\_\_\_Determine which position/s need a better way to compensate and bonus team members. (I recommend picking just ONE to start.)
	+ Salesperson
	+ Service Tech
	+ Installer/Production Team Member
	+ Office Team
* \_\_\_\_\_\_\_\_Explore, determine Scorecards. Roll out and start a baseline.
* \_\_\_\_\_\_\_\_”Grandfather” in current team members, and restructure pay to the Organizational Chart. No one goes down the ladder! Clarify the top of the ladder.
* \_\_\_\_\_\_\_\_ Meet privately and individually with all team members who are involved with, affected by the changes before you announce or post the new plan to the team.
* \_\_\_\_\_\_\_\_ Commit to review, update, tweak, and/or change the program after 90 days.
* \_\_\_\_\_\_\_\_ Discuss, refine, decide on Salary Levels…the ladder of opportunity.
* \_\_\_\_\_\_\_\_ Discuss, refine, decide on type of compensation for the position you are working on. Consider base pay and commission, bonus and contests. Consider the accounting implications.
	+ Hourly wage
	+ Commission
	+ Subcontract
	+ Salary
	+ Bonus – lump sum or percentage
	+ Profit Sharing
	+ Ownership
* \_\_\_\_\_\_\_\_ Create and document the Rules of the Game. Keep a running list of questions, “blue moon” events.
* \_\_\_\_\_\_\_\_Managers hold weekly meetings per department on the Organizational Chart.
* \_\_\_\_\_\_\_\_Managers commit to weekly, individual standup meetings, Ride Alongs, Side by Sides, with their team members. Consider ending the yearly review and adopting a weekly check in.
* \_\_\_\_\_\_\_\_ Commit to Projects that will help you help team members be successful in their positions. Put on Master Projects list, Top Projects list.
	+ Written Manuals
	+ Sales Training
	+ Product Training
	+ Technical Training
	+ Operational Training
	+ Communications Training
	+ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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* \_\_\_\_\_\_\_\_ Update all accounting and payroll procedures.
* \_\_\_\_\_\_\_\_ Keep Score for \_\_\_\_\_\_\_\_ before adding the bonus. Establish minimum levels of performance.
* \_\_\_\_\_\_\_\_ Update Budget and Selling Prices? I suggest you updated quarterly at least.
* \_\_\_\_\_\_\_\_ Host a Family Day to review all compensation and employee benefits with family members.
* \_\_\_\_\_\_\_\_Plan and launch the KICK OFF for new compensation and bonus! Plan the END of the old way, and the commitment to the new pay. Double check the accounting and payroll systems to get it right.
* \_\_\_\_\_\_\_\_Reported in to Ellen and Howard! Via email and Facebook. We love video reports, too. Tell us about your successes!

Xo$ **Ellen Rohr**

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