*Congratulations!*

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

**Overview and Checklist**

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 15 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 2020 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 this Year. 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. Remember it is your responsibility to pay according to state and federal laws. Overtime rules apply. Make sure you are in compliance.
* 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 your Master Projects list, Top Projects list.
* 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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**NOTICE:** Anytime money moves from or to someone, into or out of your company, there are requirements with which you must comply. Be sure to review with your CPA and financial planner how you, as the owner, put money in and take money out. Be sure check with your tax accountant and labor law professional or an attorney to make sure that the way you pay meets all compliance requirements. Salary, hourly pay, bonuses, and benefits all have tax requirements. You are responsible for this! Make sure you are up to speed with all state and federal income, payroll and all other tax laws.