

Newsflash

FROM LINDA SWERLING

November 15, 2003 - With the crisp fall air comes a hint that the economy has begun to turnaround . . .

AN IMPORTANT ALLIANCE: THE ROLE OF OPERATIONS IN SUCCESSFUL MARKETING

PROBLEM

The managing partner of a large professional services firm had spent two and a half years focusing the management team on reducing expenses and staffing whenever possible.

As the economy began to improve, he felt that they needed to shift gears to become poised for growth, preparing for:

- ◆ Expanded marketing efforts
- ◆ Increased sales
- ◆ Additional work for the back office areas

So while the marketing and sales departments worked on a plan to broaden their efforts, he asked operations to prepare for the upswing as well. They began to reexamine workflow and procedures to position themselves for the loosening economy.

SOLUTION:

The organization adjusted the following areas:

Accounting

- ◆ Reorganized the accounting system to track direct costs (COGS) and overhead (G&A) expenses. They also set up profitability tracking job-by-job.

Communications

- ◆ Formalized their customer relationship management (CRM) processes in each department to ensure that the firm meets or exceeds client expectations at every contact point.
- ◆ Implemented regular senior management meetings to ensure that each manager understood the workflow and plan.
- ◆ Implemented weekly cross-functional staff meetings designed to keep interest high and uncover bottlenecks once activity increased.

Employees rotate chairing the meeting, improving attention and allowing different perspectives.

Tip: To be effective, these meetings have written agendas, begin and finish on time, and assign tasks and due dates - resulting in meetings that are energizing, not demotivating.

Human Resources

- ◆ Instituted improved performance evaluation processes so when employees extend their efforts they are properly and regularly recognized.
- ◆ Reanalyzed current employee strengths and weaknesses to understand potential for reallocation of staff as departments become busier.

Database

- ◆ Updated equipment and software so managers can use PDAs to affordably and easily keep up-to-date remotely.
- ◆ Redefined what information they needed to track to keep up with increased business and adjusted the systems to automate data capture and management reporting.

RESULTS

The firm achieved a rare feat - they put their operations in tip-top shape, which has enabled them to meet the demands of a successful marketing and sales effort.

If you want help ensuring that your business operations are ready for growth and expanded marketing efforts, please contact us at 617-277-0222 or linda@level2solutions.com.

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