APPENDIX A

Centratel’s Strategic Objective

NOTE TO STAFF: The Centratel Strategic Objective is the basis for all corporate and individual decision making.

Trite mission statements that declare “We want to be the best and we want our customers to be happy” don’t provide meaningful direction and do little more than make company stockholders feel good for the moment. And voluminous multiyear work plans can’t account for the day-by-day changes in our industry.

Instead, the Strategic Objective precisely describes our market and direction, as well as who we are and how we function. It reminds us of what is most important and it gives us an overview of general strategy. By following its guidelines, growth and success will take care of themselves. In the spirit of simplicity, we limit the length of the Strategic Objective to one page. We’ve modified it through the years, but the fundamentals have never changed.

Statistically we are the highest-quality telephone answering service in the United States.

We understand that every result is preceded by a 1-2-3-4 step process. It is within these processes that we spend our time, as we relentlessly “work” the systems of the business to perfection.

Our guiding documents are the Strategic Objective, Thirty Principles, and the collection of Working Procedures.

Centratel’s primary offering is 24/7/365 telephone answering service for business and professional offices throughout the United States. Peripheral services are voice mail and paging for the Central Oregon region only.

Through intense commitment to our employees, we will contribute to the success of our clients. The consequence of having loyal, smart, hard-
working, long-term, and well-compensated staff is superb quality service to customers.

Our business is complex, with many human, mechanical, and computer systems in simultaneous motion. Success depends on refined communication and organizational processes, dedicated staff, documented point-of-sale procedures, first-class office space and equipment, rigorous quality assurance with continuous measurement, assertive innovation, intense planned maintenance/system improvement, aggressive and measured marketing, and relentless attention to detail in every nook and cranny.

Competitive advantages include a near-flawless level of message processing accuracy, products designed around the unique needs of the customer, thoughtful customer service that is immediate and consistent, the latest high-tech equipment, and personal/corporate integrity. We use extraordinarily efficient communication tools and protocols. We constantly refine and improve all internal systems and mechanisms.

To grow, we proceed with an “if we build it, they will come” philosophy, juxtaposed with assertive marketing efforts.

Although we tightly direct Centratel’s operation through guiding documentation, we will modify that documentation immediately if an enhancement can be made: “Our operational framework is rigid, but that framework can be modified instantly.”

We segment responsibilities into specialized “expert compartments” with appropriate cross-training among departments. We have backup personnel for all positions.

Primary vertical markets include medical, veterinary, home health/hospice, funeral home, HVAC, property management, hi-tech, 24/7 on-call, front office/virtual receptionist, and utility.

(For help in with your Strategic Objective, go to businessdocumentation software.com.)
APPENDIX B
Centratel’s Thirty Principles


2. We are the highest-quality answering service in the United States. We do whatever it takes to ensure the quality of service to our clients, employees and vendors is impeccable.

3. We draw solid lines, thus providing an exact status of where things stand. Documented procedures are the main defense against gray-area problems.

4. “Get the job done.” Can the employee do his or her job, or is there always a complication of one kind or another? This ability to “get the job done quickly and accurately without excuses or complications” is the most valuable trait an employee can possess.

5. Employees come first. We employ people who have an innate desire to perform at 100 percent. We reward them accordingly. The natural outcome is we serve our clients well.

6. We are not fire killers. We are fire prevention specialists. We don’t manage problems; we work on system enhancement and system maintenance in order to prevent problems from happening in the first place.

7. Problems are gifts that inspire us to action. A problem prompts the act of creating or improving a system or procedure. We don’t want setbacks, but when one occurs we think, “thank you for this wake-up call,” and take assertive system-improvement action to prevent the setback from happening again.
8. We focus on just a few manageable services. Although we watch for new opportunities, in the end we provide “just a few services implemented in superb fashion,” rather than a complex array of average-quality offerings.

9. We find the simplest solution. Ockham’s Law, also called the Law of Economy, states, “Entities are not to be multiplied beyond necessity . . . the simplest solution is invariably the correct solution.”

10. The money we save or waste is not Monopoly money! We are careful not to devalue the worth of a dollar just because it has to do with the business.

11. We operate the company via documented procedures and systems. “Any recurring problem can be solved with a system.” We take the necessary time to create and implement systems and procedures, and in the end, it is well worth it. If there is a recurring problem, a written procedure is created in order to prevent the problem from happening again. On the other hand, we don’t bog down the organization with processes and procedures that target once-in-a-while situations. Sometimes we elect to not create a procedure.

12. “Just don’t do it.” Eliminate the unnecessary. Many times, elimination of a system, protocol, or potential project is a very good thing. Think simplicity. Automate. Refine to the smallest amount of steps or discard altogether. Would a simple “no” save time, energy, and/or money?

13. Our documented systems, procedures, and functions are “off-the-street.” This means anyone with normal intelligence can perform procedures unassisted. The real-world evidence of this is we can hire an individual “off-the-street” who has good typing skills and have him or her processing calls by the second day. For this result, protocols have to be efficient, simple, and thoroughly documented. (Before we implemented our systemized training protocol, it would take six weeks to train a TSR.)

14. Do it NOW. All actions build on “point-of-sale” theory. We don’t delay an action if it can be done immediately. Just like any major retail outlet, we “update inventories and databases at the exact
time the transaction takes place.” There is no paperwork floating around the office after a physical transaction. We ask, “How can we perform the task NOW without creating lingering details that we must clean up later?”

15. We glean the Centratel mindset from Stephen Covey’s books, including The 7 Habits of Highly Successful People, First Things First, and The 8th Habit. As well, we consider Good to Great by Jim Collins; The E-Myth Revisited by Michael Gerber; and Awaken the Giant Within by Anthony Robbins.

16. We pattern individual organization upon Franklin-Covey theory. We use organizing mechanisms that are always at hand. We prioritize, schedule, and document. The system is always up-to-date and we use it all the time. (For Centratel, this is Microsoft Outlook.)

17. Sequence and priority are critical. We work on the most important tasks first. We spend maximum time on “non-urgent/important” tasks via Stephen Covey’s time-matrix philosophy.

18. We double-check everything before release. If a penchant for double-checking is not an innate personal habit, then it must be cultivated. Double-checking is a conscious step in every task, performed either by the individual managing the task or someone else.

19. Our environment is spotless: clean and ordered, simple, efficient, functional. No “rat’s nests,” literally or figuratively.

20. Employee training is structured, scheduled, and thorough. Assertive client contact is also structured, scheduled, and thorough.

21. We are deadline-obsessed. If someone in the organization says they will be finished with a task or project by a certain date and time, then he or she commits to finishing by that deadline (or, if legitimate delays intrude, advise coworkers well in advance that the deadline is impossible).

22. We maintain equipment and keep it 100 percent functional at all times. If something is not working as it should, fix it now—fix it now even if it’s not necessary to fix it now. It’s a matter of good
housekeeping and of maintaining good habits. This is just the way we do things.

23. Mastery of the English language is critical. We are aware of how we sound and what we write. We do whatever we can to improve. We are patient as a coworker corrects us.

24. We study to increase our skills. A steady diet of reading and contemplation is vital to personal development. It is a matter of self-discipline.

25. As opposed to “doing the work,” the department manager’s job is to create, monitor, and document systems (which consist of people, equipment, procedures, and maintenance schedules).

26. The COO oversees department heads and overall systems. It is the COO’s job to direct, coordinate, and monitor managers.

27. We avoid multitasking activities. When communicating with someone else, we are 100 percent present. We give full attention to the person in front of us (or to the task at hand). We focus on listening and understanding. Read the classic *Treating Type A Behavior and Your Heart* by Meyer Friedman. “Mindfulness” is paying complete attention to one thing at a time: read *Full Catastrophe Living* by Jon Kabat-Zinn.

28. When in the office we work hard on Centratel business. We keep our heads down; we focus, and in turn the company pays very well. That’s “the deal.” The workweek rarely exceeds forty hours.

29. Complete means “complete.” Almost or tomorrow is *not* “complete.” In particular, this is germane to administration staff’s use of Outlook task functions.

30. We strive for a social climate that is serious and quiet yet pleasant, serene, light, and friendly. Centratel is a nice place to work.

(For assistance with your Operating Principles, go to workthesystem.com/oppguidelines and businessdocumentationsoftware.com.)
APPENDIX C
Sample Working Procedures

Here are sample Working Procedures from Centratel, exactly as we use them as of the date of this printing. Note that the format of all Working Procedures should be the same, so it is important to establish a set template for all to use. (We’ve created a software platform that has set parameters for all three primary documents, ensuring consistency, privacy, and protection of all documents. Go to businessdocumentationsoftware.com.)

E-mail Signature Procedure

6/12/13

Your signature on your e-mails should conform to the following standards. Use 10- or 12-point type in your choice of Arial, Times New Roman, Verdana, Tahoma, or Garamond typefaces. You may do it in black or dark blue. List your information as follows:

1. Your name
2. Your title
3. Centratel
4. Telephone numbers
5. Fax numbers
6. Web site address

Example:
Jim Jones
Telephone Service Representative
Centratel
To create your e-mail signature in Outlook:
1. Open Microsoft Outlook
2. Click on “Tools”
3. Click on “Options”
4. Click on the “Mail Format” tab
5. Click the “Signatures” button
6. To create a new signature click “New,” or to edit an existing signature click “Edit”
7. Enter the information as listed above
8. Click “OK”
9. Click “OK”
10. Click “Apply”

TSRs: Bidding on Shift Blocks  
3/3/14

This is the protocol for filling an empty shift block. Also, it is an opportunity for any TSR to indicate a preferred schedule block, even if their desired block is currently filled.

1. A new shift block opening will be announced by e-mail to all TSRs. If a TSR is on vacation, management will make every attempt to reach the TSR, informing them of the new shift block availability.
2. There will only be one bidding period and it will be at least 48 hours in duration. A deadline date/time will be given.
3. To apply for a shift block, a bid must be submitted by e-mail to the Call Center manager within the bidding period. No late bids will be accepted.
4. If a TSR bids on a new block and is ultimately awarded that block, their old block will become available. So, for any TSRs who would
like a different block, even if that block is currently filled, he or she should indicate their preference so that if their desired block becomes available in the bidding process, they will be considered for it.

5. A TSR’s current schedule block will not change unless he or she bids on another block. In other words, TSRs who are happy in their existing schedule block do not have to do anything during the bidding process: TSRs who do not bid will not, under any circumstances, be changed to another block. In doing nothing, a TSR’s block is absolutely secure.

6. TSRs should not consider their bid officially accepted until he or she receives notice from the Call Center manager that it has been received.

7. If two or more TSRs bid on the same block, the block will be awarded based on seniority.

8. If there is still an open block after the bidding deadline has passed, we will look outside the company for a new employee to fill that block.

9. In accepting a new shift block, a TSR will be ineligible to bid on another shift block for a period of three months.

Note to reader: The following Daily Deposit Procedure was reduced to twenty-three steps for a number of years, but in April 2011 we added a check reader so our receivables manager would no longer have to physically deliver checks to the bank. This latest system improvement also adds up the checks into a total amount, saving even more time. With this additional subsystem, the procedure is now at forty-two steps (eight of the forty-two steps are to cover the rare times the “batch totals” don’t match due to an input error). So, with this system improvement, there are more steps in the working procedure but lots of saved time for our AR manager Teresa (at least three hours per week). Also, there is less liability as there is no longer any street time involved in making the deposit. It took a total of four hours to install and debug the check-reader system and tweak the working procedure. Yeah!
Daily Deposit

2/1/14

This explains how we process payments into TBS for any account as well as the instructions for depositing the checks into the Centratel bank account. Generally you will process deposits on Monday and Thursday of each week, on shut off day, and last day of the month.

1. In TBS under Activities menu, select “Enter Payments.”
2. Select “Direct Entry.”
3. Select the hand to the left of the “Cust Ref” box and toggle until you find “Account.”
4. For each separate payment, enter the four-digit account number and the account will automatically be pulled up.
5. Enter the amount of the payment in the “Payment Amount” box, using the decimal point. (Verify that the amount is paying the account balance or invoice balance. If not, keep track of those accounts so they may be reviewed later for discrepancies.)
6. Tab once to the “Check Number” field and type in the check number. (if there is an excessively long check number, only enter the last five digits -sc).
7. In the “Payment Type” field, select appropriate payment method. If it is a money order, enter “M.O.” Note: If payment is in the form of cash, type the word “CASH” in the Check Number field.
8. Click the “Post” box to apply the payment. Once posted, it will clear the screen so the next payment may be entered.
9. Continue until all payments have been entered.
10. Double-check that each check has not been postdated and has a signature.
11. When all payments have been entered, select “Payment Register.” This will show all payments entered on this deposit transaction.
12. Open Internet Explorer and click on Bank of Cascades on favorites bar.
14. Enter “CTS” in the office field.
15. Enter your login that was given by the bank and click continue to enter pass code.
16. Click on “Capture” and Create New Batch screen will pop up.

17. Verify that Centratel Checking is listed for primary account and click “Select” in the Action column.

18. Leave Batch Name field blank.

19. Enter the total $$ amount listed on TBS Payment Register and the number of checks.

20. Place the batch of checks into the check scanner facing the window in the right side holder and click on “Create Batch”. Then click “start batch scan.”

21. Once scan is finished click “Complete Batch” and remove checks from machine.

22. If all checks were scanned properly the screen will say that the “Batch is Balanced” and move to step #31.

23. If any checks have failed or need editing they will appear on the screen and come up one by one with highlighted fields or (*).

24. Enter in the $$ amount or other required check information. If it appears that checks were pulled through stuck together “piggy-back” delete those and set both checks aside to rescan.

25. Once fields are entered click on submit and if the check still isn’t being added then click “advanced” to enter additional fields and submit (OnUS2 field is required enter the checking account number on the check and end it with “U”).

26. Once you are finished with all checks that scanned incorrectly, the batch screen will then come back up and if it is balanced move to step #31. If batch is unbalanced it will tell you by how much. Example; if it is off by $2 dollars, you will need to find that amount.

27. Click on “Return to open batch” and under actions click on “Search.”

28. This brings up Batch Items search screen; you can verify all the checks and the corresponding amount to make sure that they were scanned properly. (for example a check may be for $206.00 and it could have read it as $208.00) So you would need to change that amount by clicking on “edit” next to the check. Continue to do this until you have corrected all amounts.

29. Now that the amount was found click on “return to open batch” at the bottom of the screen, which brings back up Balance batch and should say Batch is Balanced.
30. Click “close” located in the Actions column by the $$ amount. A PDF report will come up and you can X out of it (not needed)
31. Click on “Approval” on far left hand side of screen below “Capture.”
32. Approve the batch
33. Now click on “Reports” in far left hand column. Then choose “Approved Batch Detail.”
34. Print the report and logout.
35. In TBS under “Payment Register,” select “Bank Deposit.”
36. Verify the deposit date in the window. Click the green check mark. A window will open. For the Title, type in “DEPOSIT” and the deposit “date” (eg. 2/12/14).
37. PRINT THIS DOCUMENT!! This is the best print of this document. However, if you don’t print it for any reason, you can print any day’s deposit record, although you need to print 2 reports—one gives you the detail per customer and one gives you the total—the two should match. To print those reports—in TBS under “Miscellaneous—Payment Register Summary. (click detail for account names).
38. After printing the document, close the window. It will ask “O.K. to deposit this payment batch?” Select “Yes”
39. Attach both printed reports together.
40. In the bottom left hand drawer are slips of paper, write date and total of deposit and attach to the checks. File the batch in the front of the box.
41. Enter the amount of deposit in “Daily Receivables Journal.” I:\Daily Receivables (password is “cash”).
42. File the report in the appropriate folder for the month and year of the day’s deposit, file cabinet is in the Office Managers office and in the top drawer.

Filming an Interview

Here is a working procedure that we created just before publication of the third edition. It’s rough, as I put it together in a matter of just a few minutes as we began to create marketing elements for our new Work the System Academy product. Clearly there is more work to do to make this procedure more comprehensive and understandable. I add this rough-hewn draft to
show that it is not necessary to be an experienced professional in a given endeavor in order to produce a procedure that will be entirely useful.

Three Cameras: Basic Setup

1. At the site, allow at least one hour for setting up.
2. Camera 2 has host audio. Camera 3 has guest audio.
3. Use two light umbrellas: one between camera 1 and camera 2, and the other between camera 1 and camera 3.
4. Cameras are to be set up out of harm’s way so they can be easily monitored from behind.
5. Host framing (camera 2): vertical second button down/slight space overhead, with horizontal spacing at 60 percent left/40 percent right. Can be framed to shoot slightly upward.
6. Guest framing (camera 3): vertical second button down/slight space overhead, with horizontal spacing at 60 percent right/40 percent left. Can be framed to shoot slightly downward.
7. Camera 3 option: include back shoulder of host.
8. Carefully gauge backdrop so there is no vertical line converging with the host’s or guest’s heads. Is anything else distracting in the background?

9. Do the cameras have fresh batteries (transceiver and receiver for each camera)? It is the director’s job to make sure all batteries are fresh. The major danger is losing audio.

10. Do a sound check.

11. All cameras should be connected to AC power, if available.

12. All cameras operate unattended. Do not adjust zoom. Do not touch. Do not walk in front of running cameras.

13. The guest and host should remain in the same position in their chairs for the duration of the interview.

14. The guest and host should not slump back in their chairs. They should stay upright or slightly forward. (A fish-eye lens makes whatever is closer look bigger.)

15. Turn all mobile phones off (if there are any landlines, their ringers should also be turned off).

16. All three people must start the cameras at the same time.

17. Use 1-2-3 countdown to simultaneously start cameras.

18. Each operator must confirm that camera startup was successful.

19. The director steps between the host and guest and does a single hand clap to sync the audio.

20. The host and guest must not speak (make sounds of agreement, laughing, etc.) while the other is talking.

21. In an informal setting, the production people are not to drink alcohol. (Perhaps it is OK for the guest.)

22. The production people are not to do anything that interrupts the flow of the host/guest dialog. They should keep their movements and chatter to a minimum; each should sit down, relax, and quietly monitor their own camera.
I never intended for my book to be feel-good entertainment. I wanted to go deeper and really help my readers by providing a set of clear, tangible instructions to follow.

Businesses have their various departments, of course, including sales, IT, operations, accounting, etc., but too often they lack an efficient, mechanical underlying structure. It’s a little like building a skyscraper without the steel framework. The Academy is perfect for small businesses that started too quickly and went for growth while brushing structure to one side. The Academy provides the business owner a simple and fast bolt-on installation of the Method which will bring about stability and control and thus cause super-high efficiency. Of course, super-high efficiency means more profit for the business and more free time for the owner: making more and working less.

So, my aim in sharing the work the system Methodology is not to help the reader experience a short-term high and then return to self-defeating ingrained habits within a few days of reading the book, having failed to follow the action steps. Instead, I want to see people do something to fix their less-than-satisfactory situations. For some small business owners, the book is not enough, and for these readers we created the Academy. Via online tutorials, it’s meant to make implementation an easy, 1-2-3-4 step process.

Over the past years I’ve been asked the following questions, and they are what I address in the program:

1. I don’t have time to do this because I’m too busy, so how can I get the work the system Method installed in my business?
2. How can I get motivated enough to make sure I actually follow through?
3. How do I get my staff to buy into the work the system Method?

4. What are the organizational changes that I must make? How do I implement them?

5. What is the format of the documentation? How can I be sure I compose it correctly? In fact, where do I start?

I understand that many people will struggle to take action. Procrastination is just human nature. It’s also true that making a half-attempt at implementing the work the system Method is not the way to do it. More than a few people I’ve talked to want to do the work but need some kind of catalyst to spark them into actual action: I’ve had numerous requests over the years to create something that would enable business owners to break out of their state of entanglement and fully reengineer their lives and businesses over a short period of time. Many of the requests have been from people who want hand-holding through the process, with every step explained in three-dimensional detail, making it impossible for them to go wrong.

There also have been the questions about what it takes to get staff to climb on board, and questions suggesting there is fear that there will be a mutiny or serious blowback from staff about the Method. (It pains me to hear this because, truth is, the work the system Method energizes and motivates staff.) The great thing about the work the system Method is that it provides fast results. No delayed gratification. And, the process is believable and logical. Your staff will be excited to be involved if you properly explain the changes. You’ll find there is not one segment of the Academy program that must be held back from staff. There’s no mystery or special secret here, nothing that can’t be shared.

The heart of the Academy product is the detailed video training in which the explanation of the Method is done personally by me, with Mike Giles’ assistance. We train you and your management staff directly. This way, nothing is left to chance or question, and the burden of teaching much of the information is removed from your shoulders. Clearly though, you as business owner will play the lead role in creating a proper environment for your staff to learn the Method, and of course you will be ultimately responsible for making sure the work is done. We recommend that you and your management team watch the specifically employee-targeted
video sessions together as a group. This way you will have company-wide buy-in, and the compound impact of your entire team working with you on this will be far reaching. The employee’s role is to make his or her domain vastly more efficient which will in turn have a dramatic impact on the overall operation. If you have no staff, the work the system Method still applies. Once you create a solid framework of systems and procedures, you will have established a foundation for growing your business. Most single-proprietor businesses remain without staff because they can’t figure out how to scale their operation.

Then there are questions about documentation. Mostly they are about what format to use and exactly what information to include. I can understand this. At first, I struggled with that, too. But now, we’ve customized a software package to make things simple (see Appendix J).

We spent a huge amount of time designing this program, which goes way beyond the book in scope. It’s a one- to three-month program (the time necessary to complete it depends on the complexity of your business and your readiness to make changes).

In the Academy we provide all the templates, guidelines, and step-by-step video training required for you to make a shift in the way your world functions—and, in short, to help you get what you want in your business and in your life. You get everything you need to implement highly efficient systems and processes with the aim of freeing up more time and making more money.

The information is presented in a logical, methodical order so you can permanently rid yourself of chaos and disorder. It’s about helping you find real freedom by paying attention to the simple mechanics of your business and your life. (Go to workthesystem.com/academy)

—Sam Carpenter
APPENDIX E

Coaching

Either in a group or individual format, the Work the System 120 Day Challenge is an intense, hands-on program that will guide you through the exact steps required to implement systems in your business and, by default, in your personal life. Whether you’re just starting or have decades of business experience, you will get results—we guarantee it. For more information go to workthesystem.com/coaching, email us @ info@workthesystem.com or call us at 800-664-8351.
APPENDIX F

Premier One-on-One Consulting

Our Premier Consulting service is for companies with a minimum of 10 million dollars in annual revenue. You will be working directly with me, Sam Carpenter, and my WTS Consultants business partner, Josh Fonger. Offering this one-on-one service since 2011, we have installed the WTS Method in selected businesses with up to 500 million dollars in annual revenue. We limit ourselves to no more than three clients at one time. Systemizing a business is a cultural shift, and in a larger company, trying to make that happen using just this book is a challenge. The fully tailored transformation process includes face-to-face training and support over a (typically) four- to six-month period. To succeed, it is important the systems mindset becomes enmeshed within the fabric of your operation, and that you and your own staff learn to create the necessary documentation. Our goal is to help you install the Method 100% across all departments so that you will not require our services after the implementation project is complete. For more detailed information, go to workthesystem.com/consulting, email us at info@workthesystem.com, or call us at 800-664-8351.
APPENDIX G

Ockham’s Razor and the TSR

Note to the reader: I originally wrote this article in 2002 for a telephone answering service trade journal. It was directed to answering service owners, but the overarching message is simple and is applicable to any business with employees. I have updated it slightly for this book.

Ockham’s razor is a principle attributed to the fourteenth-century English philosopher William of Ockham. It states that “entities should not be multiplied beyond necessity; that one should choose the simplest explanation, the one requiring the fewest assumptions and principles.”

Ockham’s Law and the Long-Term Employee

Exactly what is the problem?

What attributes do telephone answering service (TAS) owners seek in their telephone service representatives (TSRs)? The short list includes cheerful and constructive attitudes, high-quality performance, and long-term employment.

Employee performance and turnover are the major topics in our trade meeting get-togethers, both in general sessions and in one-on-one discussions. In our industry, it’s a fact that most TSRs don’t stick around for the long term, and for those who do, there are sometimes “negative comportment” problems.

Why is there such tumult within answering service operations departments? Why are owners constantly trading tips and secrets in an attempt to stem the tide of incessant staff turnover, and why do these owners berate themselves, their employees, and the telecom industry in general?
The problem is not due to unqualified job applicants or a general lack of work ethic. Instead, it’s the owner’s failure to address the real-life requirements of staff, proffering instead gimmicky and manipulative incentives and/or punishments.

I once knew an answering service owner who claimed that staff turnover was not his greatest problem (although it was his number two problem). He argued that the greatest challenge was the state government’s mandated increases in the minimum wage. He complained, “It keeps going up!”

There was another owner who had a well-thought-out, documented employee punishment procedure for nonperformance and “bad attitude.” (The floggings will continue until morale improves!) And here’s a comment I overheard from a TAS operations manager: “We can’t do drug testing. I would have to fire everyone and then there would be no one to answer the phones!”

None of those three people is in the industry anymore—and all three of the businesses they operated are defunct.

Let’s start with the topic of wages. What about TSR compensation? Here’s the ubiquitous industry rationale for offering meager pay: “You just don’t understand. This is a competitive, cutthroat, low-income industry and we can’t pay a better wage. A telephone answering service sells a commodity, and although quality is important, in the end, success is more a function of low price. If we raise our service rates, we’ll lose our customers.”

Of course, client service rates are a factor, but what if we could pay our TSRs more while making their work environment more stable and logical? If this produced a long-term staff that provided better service quality, could we charge clients more?

So why is there so much staff turnover? What are the root no-frills, no-cover-up, no-Band-Aid causes of the problem? The causes are simple and, in their simplicity, they expose unsuccessful attempts to cultivate stability for what they are—smoke screens that offer initial intrigue but have nothing to do with a TSR’s fundamental needs.

I will interject a simple yet vital concept here. Long ago, when I had just started in the business, the owner of a large and successful TAS in Portland, Oregon, told me: “Your TSRs want to do a good job. It is your
job to make that easy for them. Don’t ever second-guess their motivation. *They want to do a good job!*"

If an owner or manager begins with the premise “all employees are lazy” or “there is no work ethic anymore” or “I can’t pay enough to find and hold quality people,” where will that lead?

If these are your fundamental beliefs, you must change them. If you don’t, you are doomed.

Here are the three primary reasons why most answering services can’t keep people long term. They are disarming in their simplicity. First, employees aren’t getting what they want in terms of pay and benefits. Big surprise. Second, they don’t know what ownership expects of them. They have to be mind readers in order to stay out of trouble. Third, with knee-jerk irregularity, owners manipulate TSRs in subtle and not-so-subtle ways, while seldom acknowledging their good work.

In other words, the money is not good, requirements for performance are mysterious, and childish reward and punishment schemes erupt sporadically while good work goes unnoticed.

**A PHILOSOPHY AND A SYSTEM OF EMPLOYMENT**

Develop a philosophy of employment that will address the true needs of your employees. If you worked for someone, would you want it any other way? Could anything be more simple?

Remember this: there are no superhuman people out there, but there are plenty of great people who are looking for solid opportunities.

You need stable employees; ones who are reliable, honest, and hard-working. There are lots of people out there like that, and if you do things right, they will find their way to you, be committed, perform superbly, and stay long term. All you must do is satisfy people’s reasonable needs and not ask them to be mind readers. Tell them exactly what you want them to do, and treat them like the adults they are. If you do this, you will have an extraordinary employment system: one that acknowledges your TSRs’ worth as it fulfills their personal requirements.

Be crystal clear about the employer-employee arrangement without being afraid to throw in a challenge that says “this is the deal” between
the employer and the employee. At Centratel, the deal we offer TSRs is simple: “We will pay you very well if you give us 100 percent.”

You must put your extraordinary employment system down on paper so your people know what it is. It will take time to do this, but so what? You are already breaking your back dealing with chronic staff turnover. Isn’t that hard work? Doesn’t that take time? Just channel the same time and energy and money in this different direction. Swallow the pill: sensible documentation is a prerequisite for long-term staff stability; if you create it, stability is what you will have.

**WHAT TO LEAVE OUT**

Incentive plans that don’t address the fundamental needs of employees will fail. These programs are worse than a waste of time and money. They crush morale. And what about punishment? Don’t even think about it.

Before discussing what to include in your new employment vision, it is important to consider what *not* to include. By dropping ineffective actions, you will promote simplicity as you gain time and energy.

Here are some “motivators” I’ve heard about in other answering services: useless gifts (as exemplified by a huge bag of plastic Mickey Mouse ears brought back to TSRs after the owner visited Disney World); complicated formulas to award cash bonuses for perfect attendance; “fun” games and rewards for those who attend staff meetings. I’ve heard of gift certificates for having a “good attitude,” and movie theater tickets as prizes for making it through initial training or for “good behavior.” Also useless: long, drawn-out conversations with problem employees in which management attempts to reason with them, as in, perhaps, convincing them to show up for work on time.

What do all of these strategies have in common?

First, they have nothing to do with the real, long-term needs of people. Arriving inconsistently, they are of low intrinsic value. They are ineffective Band-Aids.

Second, TSRs perceive motivational gimmicks and heart-to-heart chats for what they are: manipulative and childish, management’s thinly veiled efforts to maneuver them into being good little girls and boys.
This is insulting in a low-key way. This is carrot-on-a-stick, Bugs Bunny methodology, and within your staff it will breed an underlying disrespect for you because it is disrespectful of them.

**GOOD PEOPLE FROM THE START**

At Centratel, we have little staff turnover in our operations department. Only occasionally will a TSR call in sick or arrive late. Everyone makes it to staff meetings. These are exceptionally positive, solid, good people—and they were that way before they showed up at Centratel. Our first success is in being able to find people like this and then convince them to work for us.

Rather than attempting to cultivate the attitudes and work ethic we seek, we carefully pick good people and then we don’t alienate them.

In addition to giving TSRs what they need for compensation and treating them like the adults they are, we work hard to give them a stability that, occasionally, is in contrast to their lives at home. It may be just a job, but Centratel is a place that is safe, calm, and predictable. This stability is rooted in our rigorous documentation: in exact detail, we have written down what we want and expect them to do.

As a sidebar: in the history of my own business, the ground-shaking paradigm shifts came at the blackest of times. It was usually “do something dramatic right this minute, or file for bankruptcy tomorrow morning.” In these on-the-edge times, a huge and immediate change in philosophy and operating policy was exactly what was needed, and our present staff philosophy arrived in exactly that way.

Be thankful, I say, for the hard times we survive.

**GETTING SPECIFIC**

Please. No more Band-Aids.

What would William of Ockham do if he owned a telephone answering service? What follows is my best-guess list. None of these strategies are new or revolutionary, but what they have in common is that they meet the needs of both TSRs and owners. Remember to presume the good intentions of each TSR.
1. You’ve already identified the number one item: pay a generous wage. Money is why people come to work. Forget the convenient theory “pay isn’t the most important part of a job; it’s the feeling of being valued,” etc. How ’60s is that? Don’t ask college campus psychologists and sociologists what is most important to your people. Ask your employees what is most important to them! Long ago, I submitted a written questionnaire to our TSRs asking what was most important to them regarding their positions with Centratel. The overwhelming response was that pay is what is most important—and so I was delighted to find I had “a firm grasp of the obvious.” Remember that a high pay scale has benefits that are not always obvious and measurable—high-quality performance from long-term employees. Have faith this nonmeasurable benefit will more than compensate for the extra cost.

2. I’ll get some argument on this one, but my bet is that Sir William would propose that there be no part-time people. All staff members should be full-timers. Part-timers won’t have the same experience on the phones. They can’t get the same workout with the accounts and the techniques. How can a twenty-hour-per-week employee attain the same degree of expertise as a forty-hour-per-week employee? Also, for part-timers, the job tends to rank a too-low priority in their lives. We want career-minded, serious people who consider their jobs important enough so that what we want, and what they get, really matters to them. We don’t take our business in a casual way and neither does a full-time employee.

3. No paid sick days. Why? Because paying people when they are not at work is a reward for not being at work! We provide PTO, but it is a cash payment that shows up as TSRs earn it, as a separate line item on their biweekly paychecks. TSRs can take time off—two to three weeks each year, depending on length of employment—but because PTO is paid in advance, there is no pay while they are gone.

4. Should you offer health insurance? Yes.

5. If an employee does a good job, say so publicly. If an employee does a poor job, also say so, but privately.
6. We put shift schedules out to bid and award them by seniority. Inevitably, the most senior TSRs occupy the best weekday daytime shifts, with everyone understanding this is the reward for long service. The less-tenured TSRs will also value their time with the company, seeing their accumulating work histories as assets that grow more valuable every day. The seniority method is logical and fair.

7. Put the job down on paper. This includes a clear and concise operational manual, an employee handbook, and individual job descriptions. It’s a stressful occupation as it is: do TSRs also have to be mind readers and fortune-tellers in order to survive? To the very last detail, instructions for performing the work should be recorded in black-and-white, in hard copy, and in electronic files.

8. Implement “pay by performance,” with an objective method of measurement. At Centratel, we have a full-time independent quality specialist who rates call quality and reviews performance weekly with each TSR. TSRs can boost their take-home pay by up to 30 percent with this plan. For the TSR, that additional 30 percent is the fun money and/or get-ahead money that lies beyond the necessary money.

Cultivating a long-term, loyal staff begins with a mindset change. Stop looking for the perfect employee, inserting gimmicks, or blathering away with impotent excuses about a declining work ethic or nonsensical theories of human motivation. Instead, per Ockham’s razor, “choose the simplest explanation, the one requiring the fewest assumptions,” and document a plan that addresses the real needs of your people—people who want to do a good job.
Following is our master Procedure for Procedures, which contains precise instructions for creating a Working Procedure. It is the Mother of All Procedures, the master instructions for creating the several hundred that are necessary for our operation. This document ensures each will share the same tone and format.

Don’t be discouraged by the length and complexity of it, and don’t get bogged down in what it says. Of all the procedures at Centratel, it’s the longest and most intricate. Simply consider its essence and then apply it to your own situation. It begins with a narration.

Overview to staff: We base Centratel’s mechanical functioning on Working Procedures (or simply, “Procedures”). With hundreds of human and mechanical operating processes in action at any one time, keeping Centratel organized in any other way would be impossible. Working Procedures guide everything from an emergency relay for a TAS account, to how we deposit payments in the bank, to job descriptions for staff members, to greeting customers at the door.

Strict adherence to written procedure is critical, but we counterbalance this strictness with our eagerness to make instant adjustments should the environment change or should someone come up with a better idea. Whatever your job description, if you have a suggestion for making things better, pass it on. If it’s good, we’ll change the written procedure and implement it now!
Strict yet easy-to-modify procedures provide a huge degree of freedom to the individual staff member because the guidelines eliminate guesswork. Answers and instructions are right there. Working Procedures are the heart of Centratel’s operational model: “Freedom and responsibility within a structured yet flexible business system.”

OVERALL GUIDELINES

Is there a recurring problem or task? Then a Working Procedure is necessary. Or if there is already a procedure and a problem arises, we will modify the existing procedure to eliminate the problem. If there is no problem, let’s streamline the procedure to make it as efficient as possible. In the earliest stage of creating a procedure, get feedback from those people affected. It is mandatory the creator of the procedure and the relevant department manager be advised of any changes before they are made. In fact, they must be intimately involved with the revision, and each must give final approval to changes.

Create the procedure with an “off-the-street” simplicity. Be simple, concise, and thorough. Remember the overall goal: “Freedom and responsibility within a highly developed system.”

How much information should be included?

For narrative procedures: Add as much information as possible, but do it in a way so that the information is easily found. Use alphabetical listings, logical subheadings, numbering and bullet formats, simple and concise sentence structure, etc.

For charts and graph procedures: Design it to be simple, concise, and fast to read. Often it will be necessary to leave out information in order to make it more readable. Limit the typefaces and sizes, special formats, etc.

Per point-of-sale strategy, we will change a procedure instantly. Betterment of a procedure by modification, addition, deletion, or outright elimination is quick and without hesitation. We operate within a strict framework, but that framework can be quickly changed by group consent.

Do not assume anything. Every step must be obvious and logical. Especially do not assume the user of the procedure will be knowledgeable.
regarding the subject or can read your mind: remember the “off-the-street” methodology!

General layout: After the title, if necessary, start the procedure with a concise narrative that provides a quick overall description of the what, why, how, who, and when of the procedure. Follow this, if applicable to the particular procedure, with bulleted or numbered instructions.

Never title a procedure “Procedure for . . .” The title must be concise yet descriptive and make sense to an “off-the-street” staff member. The title must be logical so the subject can be found quickly. Start the title with the subject. For example: “Sales Call Procedure,” not “Procedure for Sales Calls.” Then start with a brief narrative of what the procedure accomplishes.

Critical: Test the procedure before release! Use an “off-the-street” subject (a staff member who is not involved with the procedure).

Post all new or modified procedures on the procedures drive. In the modified procedure, date the change, and show the new information in blue type. Hard copies are immediately printed and placed in alphabetical order in either the Administrative Procedures Folder or the Operations Procedures Folder.

Each affected staff member will review the new procedure. Upon understanding it, the staff member initials and dates the hard copy.

The staff member directs questions and suggestions back to the person who created the procedure. (If there is a question, it is evidence that the procedure itself should be further modified so questions will not have to be asked in the future.) Before release, all new or significantly modified procedures must be OK’d by the general manager.

The staff member follows the new procedure exactly. Hear this: IF A PROBLEM ARISES WITH A PROCEDURE, WE INSTANTLY ADJUST THE PROCEDURE. WE DO NOT CIRCUMVENT IT!

**SPECIFIC DESIGN**

(Note: At Centratel we don’t use this procedure anymore. The complex design specifications that are listed here are embedded in our Business Documentation Software. Go to businessdocumentationsoftware.com.)
Use template on P: drive titled “Procedures Template” and in the Template folder.
Start with the title, in the Heading 1 style (Verdana bold size 12).
Follow the title with the date, in the Procedure Date style (Verdana regular 10).
For subheadings, use the Heading 2 style (Verdana bold size 10) and for further subdivision within those subheadings, use the Heading 3 style (Verdana italics size 10).
For the body text, use the Normal style (Verdana regular size 10).
For any bullets or numbering, use the default bullets and numbering styles.
Procedures are addressed at the bottom of the last page in this way:

Select View, Headers and Footers.
Click in Footer.
1st line: Choose Insert AutoText “Filename and Path.”
2nd line: Choose Insert AutoText “Created by.” Add your name. You may have to do this manually, depending on what computer you are using and how it is set up.
3rd line: Choose Insert AutoText “Created on.” Add date and time.
Use the Footer style.

Use italics and bold sparingly.
Use the 1-2-3-step format when applicable.
Use bullets or numbers when applicable.
If a relay is involved, use numbering and the same acronyms and methodology used in TAS relays.

Is the above procedure long and complicated? Yes and no. The “Specifics” portion is simple. The “Design” portion is necessarily long because the details are complex—it’s the actual mechanical guideline for creating a procedure. But its detail is clear and concise, and therefore not at all complicated. You will note, as with the Thirty Principles document, it is nonlinear.
APPENDIX I
Centratel’s Communication System

At Centratel, following the tenets of our Strategic Objective and General Operating Principles documents, we employ the latest communications technology. It’s an interesting paradox: the simple effectiveness of our internal communications hinges on highly complex technologies. (Somehow our IT engineer, Dan, keeps all of it working with rarely any downtime.)

Right at the beginning of our transformation, we developed a Working Procedure for communication among ourselves and with the outside world. Because it’s simple and easy, our people communicate a lot.

Every Centratel staff member uses the same protocols. There is no confusion. This procedure has evolved with the technical and even social changes that have occurred in the last fifteen years. Here it is.

INTERNAL COMMUNICATIONS: PROCEDURE AND FUNDAMENTALS

The tools of active communications:

1. Voice Mail (VM)
2. Email (EM)
3. Emailed voice mail (EVM)
4. Instant Messenger (IM)
5. One-on-one via phone
6. One-on-one in person
7. Hard copy memo/procedure
What method of communication should I use?

1. Routine, not time sensitive: VM, EM, EVM
2. Time sensitive: IM, one-on-one in person or via phone
3. “Getting all my thoughts in order,” detailed explanations: VM, EM, EVM
4. Personal and sensitive issues: one-on-one in person or via phone
5. Documentation is necessary: EM or hard copy
6. Information is complex/detailed: EM, hard copy, one-on-one in person or via phone
7. Procedures: Soft copy on Procedures drive and hard copy

Point-of-Sale

Point-of-sale communications means, most of all, that when someone asks a question, the response is right now. For instance, avoid saving a message for a future response. If you must delay your reply, immediately take the time to answer the message sender to say you will get back with a detailed answer later (and be sure to provide an approximate time he or she can expect your response). Understand this approach is especially applicable to e-mail: the most basic rule is to keep your inbox empty by dealing with the issue now, via our point-of-sale mandate. The personal game each of us plays is to keep our inboxes to less than twenty items. With all of us playing this game all day long, things move astonishingly fast.

Microsoft Outlook

The Centratel Microsoft Outlook information system is the heart of our administration’s internal communications. The task list, contact list, and calendar are critical to staying organized and maximizing efficiency. Have the program open all day and use it often. Use the task list to remind yourself both of your own tasks and of tasks delegated to others.

Instant Messenger: If you are on the job, it must be active. Be sure to configure it to turn on automatically when you log in.
E-mail: Thoroughly read messages you receive. Reread and double-check each outgoing message before you send it. Is your outgoing e-mail clear, concise, and brief? Are there grammatical errors? Does your message make sense, or are you presuming you are communicating with a mind reader, or maybe someone who is fond of deciphering puzzles?

My Personal Inbox and Task List

In early 2014 I developed a dirt-simple personal organizational system in which my task list is incorporated into my email inbox. For me, the simple beauty of this is that my incoming emails, my delegated tasks, and my personal tasks are all in one place, to be accessed from my laptop, smartphone, or desktop. To delegate a task, I compose it in an email and send it to the recipient, bcc’ing myself. Important details: In the email, at the beginning of the subject window, I identify the recipient by first name (in capital letters). I follow the name with the due date (in xx/xx date format), then the title of the task. The body of the email describes the details of the task. Upon sending the email, the delegated task appears in my inbox and I keep it there until it’s complete. For personal tasks, I send the email to myself with my own name in the subject window. Now I only use the Outlook Tasks feature for recurring tasks. I do, of course, continue to use the calendar.

Giving (Delivering) a Message via Any Medium

Consider quantity before quality. In fact, Centratel’s definition of quality communication emphasizes high quantity. But note, the quantity aspect has more to do with frequency than with volume of content. Generally, if there is enough communication, quality will evolve. If in doubt about whether to communicate or not, you should communicate.

Rambling dispatches that contain more information than necessary, or messages that keep repeating the same detail, are a waste of two people’s time. The voice mail medium is particularly susceptible to fatiguing, inefficient messages. But then, sometimes a voice mail message is faster and more meaningful than an e-mail message. Sometimes a thirty-second
voice mail will deliver the same message as a fifteen-minute e-mail. Whatever the communication method, remember this when sending a message: “A great message is a short message.”

Not many people think about the quality of their communications. At Centratel, since our entire purpose is to provide the very best communication services, we have to be good at it! Much of the reason we are “the highest-quality telephone answering service in the United States” is because we unceasingly refine and improve the communication services we provide, as well as our own internal communications. We think about communications all the time. It is a primary system that we relentlessly analyze and refine.

We have many communication tools. At any given time, is the best method being used? Before leaving a message for someone, what preparation is necessary for the message to be complete, clear, and concise? While leaving the message, is too much being said, or too little?

An effective training process is to record and review conversations with callers and clients. For most of us, there is incongruity between how we think we sound and how we actually sound. This self-analysis can eliminate “yeahs” and “ya knows,” deepen one’s voice, promote conciseness, and point out annoying flaws that otherwise go unnoticed.

(Nota our Hyper-Communications Product. Go to workthesystem.com/hyper-communications.)
APPENDIX J

Business Documentation Software

BDS exactly conforms to the Work the System Method. It’s an intuitive and simple platform designed to make it easy for you to create, tweak and store your three primary documents.

BDS is simple to use. There’s no fluff or excess. It’s about “bottom up,” point-of-sale, and constant refinement.

BDS ensures that your documents are available for use only after they’ve been thoroughly reviewed and approved per your management chain of command. This guarantees that your staff is following the most accurate and up-to-date policies and procedures. And, as I said, BDS’s architecture is “Bottom Up,” which means anyone within a department can recommend a system improvement to a procedure by simply and privately submitting the idea to the department head or administrator. Automatically and instantly, via email notification, newly published documents, document changes, requests, questions, etc. are delivered to your pre-selected staff. No need to constantly check in to see what’s new and what’s changed. An important feature is the Administrator’s ability to easily insure confidentiality of documents, between people and departments. The new user has a thirty-day free trial. Subscriptions to the platform are month-to-month.

For a comprehensive overview, go to businessdocumentationsoftware.com.
APPENDIX K
Other Offerings

AUDIO AND PDF VERSIONS OF THE THIRD EDITION OF WORK THE SYSTEM: THE SIMPLE MECHANICS OF MAKING MORE AND WORKING LESS

The audio version of this 4th printing of the third edition was recorded by Sam in August 2014. It is unabridged. Both versions are available at workthesystem.com and at the usual retail outlets, including Amazon.

ACQUISITIONS

My Work the System Consulting business partner, Josh Fonger, and I are acquiring distressed companies. Must have good historical cash flow (minimum 2M in annual revenue per year) and be scalable. Looking for bricks-and-mortar or high-tech firms. Contact us at info@workthesystemconsultants.com or call us at 800-664-8351.

SPEAKING ENGAGEMENTS

Sam and/or Josh will occasionally travel for presentations. Call us at 1-800-664-7448 or e-mail at info@workthesystem.com.

HYPER-COMMUNICATIONS

With the right tools and protocols, executive and management efficiency can be doubled. (Go to workthesystem.com/hyper-communications.)
Kashmir Family Aid

Just after the October 8, 2005 earthquake that devastated great swaths of Azad Jammu and Kashmir (AJK) and the northwest frontier province of Pakistan, I traveled alone to Muzaffarabad, the capital city of AJK, the epicenter of the quake. Local Kashmiris housed me as I tried to help out. Not restricted to a guarded encampment, I was one of few Westerners to roam freely through the area, unattached to an official NGO or the U.S. military. I wrote newspaper articles and took photos in order to publicize the plight of the millions who were homeless, and I gave away cash.

The dazed survivors wandered the tent camps and streets wondering what to do next. It was devastation, with eighty thousand dead—a disproportionate number of whom were children who had been trapped in schools when the quake struck. Nearly every family I met had lost one or more close family members.

I came home and shortly thereafter created Kashmir Family Aid, a 501c3 nonprofit. Its narrow purpose is to provide assistance to the school-children of the region. I had been to Pakistan several times on business before the earthquake, and I have returned a number of times since.

Note that Bend, Oregon, and Muzaffarabad, AJK, have become official sister cities.

Please visit the Kashmir Family Aid web site (kashmirfamily.org) and view the slide presentations and photos. You will find some of my newspaper articles there too. Will you consider helping us? A school with two hundred students and eight teachers can be totally supported for less than U.S. $500 a month, but any size donation goes a long way. Thank you.

—Sam Carpenter