

Following is an excerpt from Excellence in the Workplace Employee Essential LESSON 1—You—The Greatest Asset By Daniel C. Felsted

Worksheet can be downloaded here:

<https://dl.dropboxusercontent.com/u/9599542/classes/GettingOrganized.pdf>

or from curriki.org lesson.

Getting Organized

Being organized is the first step in being efficient. When you learn to get things done in a timely manner, your boss, superiors, and coworkers will rely on you more, which makes you of more value to your employer.

This second hour of class focuses on getting organized. We will learn more about Goal Setting, Core Values, Rewards, a Study Journal, Company Log, To Do Lists and your Job Description. Understanding each of these in depth and using them in your daily life will have a significant impact on your future success.

It is another of the basics needed to become an exceptional employee and to excel in customer service.

Goal Setting

"Vision without action is a daydream. Action without vision is a nightmare."

—Japanese Proverb

Consider This.

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|--|
| <ul style="list-style-type: none">• How many of you have written goals?• What is the success rate of those with written goals vs. non-written goals and no goals? |
|--|

In Og Mandino's book "The Greatest Salesman in the World," the main character builds a vast fortune with 10 simple principles, all of which are built around setting goals. He passes his secret along to only one person at the end of his life, which then makes him his fortune. Fortunes have been made and are yet to be made but only by he/she who can discipline himself/herself to succeed. Your goals may be totally different than wealth but the fact remains that discipline is key.

"Difficult work is easy to avoid. Difficult work is exactly what will get you promoted."

"I define difficult work as the stuff that takes guts or insight."

—Seth Godin, Free Prize Inside

Author Basil S. Walth said, "If you don't know where you are going, how can you expect to get there?"

Lets talk about that for a minute. How can you expect to get where you want to go if you don't set down how you are going to get there?

There is a rumor of A Harvard Business School study that found that the 3% of the population who record their goals in writing earned an astounding **ten times** that of the 83% who don't define any goals. (The remaining 14% have goals but don't write them down.) Is this true? I cannot determine. But I do believe that you will be more successful by many times more if you write a few goals and work towards them on a regular basis!

Instructor: Add 1 more story about goal setting here.

You are your employer's most important asset. What will you do to ensure your place as your employer's greatest asset? You have an immense opportunity to determine your future success. You need to be prepared to succeed. And to be prepared, you need to do the difficult work and set goals for achievement.

Last hour we discussed the Top 10 Employee Essentials. They all deal with mastery of emotions and character. This hour we will discuss mastery of time and how you should best use it.

"Since your boss hired you to make something happen, you now have permission to build a free prize. You have the opportunity (on your bosses nickel) to build a project that will energize you and your co-workers."

—Seth Godin, Free Prize Inside

You must develop a plan where you set short term, medium term, and long-term goals. I recommend, at minimum, you review your goals at every quarter (3 month intervals) for life.

To make your goals a habit you must read your goals on a daily basis and review them regularly... weekly and monthly. Maintain a record of these goals, your accomplishments and your shortcomings.

Consider This.

- What do you think about when you don't achieve something you set out to do?
- "The secret, it seems, is to cheerfully embrace your failures and to count on your successes to outweigh them. Take a chance. Risk failure. Change something that needs changing."

—Roy H. Williams

- Success only comes from learning from your mistakes. To succeed you must never stop

learning and never stop getting better!

“Difficulties are things that show what men are.” —Epictetus

“What are the two most important factors for setting and achieving our goals? The first is setting realistic, attainable and measurable goals. If we aim too high, we’ll get frustrated; if we aim too low, we’ll achieve less than our potential. The second factor lies in achieving balance in our daily lives.”

“Balance leads to stability and consistency - the secret of achieving consistently and maintaining balance.”

“Achieving is not for the faint hearted. But given the fact that standing still means retreat and defeat, the small risk of steadily advancing is infinitely preferable.”

—Gerhard Gschwandtner

Download and read: [*StayBalanced.pdf*](#)

Start by getting a notebook and making the following sections. 1-Personal achievement. 2-Professional achievement. Under each heading list your goals (1), give them a priority (2), establish criteria for achieving each goal (3) and record a timeline for reaching each goal (4). See chart below then download [*GoalsHow-to.pdf*](#) and [*GettingOrganized.pdf*](#). It has worksheets that describe each of the sections discussed in this hour.

<i>How-to Effectively Set Goals!</i>
Record the goals to be accomplished
Establish criteria for accomplishing each goal
Provide a timeline for obtaining each goal
Review goals on regular basis

Answer these questions and post your answers on the discussion board.

1. What are some of your personal goals? *How do you plan to achieve them?*
2. What are some of your professional goals? *How do you plan to achieve them?*
3. Do you write down your goals? Why or Why not?

Some examples of goals to set for personal achievement are:

- 1 - Improve my listening skills.
 - ___ Listen to others before I speak.
 - ___ Make them feel important.
 - ___ Try to understand their situation.
 - ___ Convey sincerity.

- 2 – Develop a positive mental attitude.
 - Be positive each day.
 - Collect positive thoughts.
 - Share positive thoughts.
 - Be helpful everyday.
- 3 – Improve my speaking skills—vocabulary, and focus.
 - Read ___ hours each week.
 - Look-up unknown words and add them to vocabulary lists/*study journal*.
 - Focus on understanding what others mean.
 - Give carefully thought-out pithy responses
- 4 – Never speak ill of others, never gossip (tell stories of others).
 - Recognize gossip.
 - Don't repeat what I hear.
 - Verbally state you do not want to hear gossip, then leave.
- 5 – Be an example to those around me.
 - Always be on time *or early*.
 - Always be positive.
 - Share my knowledge with others.
 - Be friendly.
 - Look more professional.

Some examples of goals to set for customer service are:

- 1 – Implement positive words in vocabulary / Avoid negative words.
 - Used words like—please, yes, may I, thank you, appreciate, and using the customer's name.
 - Don't use words like—can't, never, don't, you have to, not our policy, I don't know, I haven't had time to.
- 2 – Smile and make eye contact with every customer that comes into the store.
 - self test using the good listeners 10 commandments.
- 3 – Ask questions when I don't fully understand something.
 - Did I ask questions when I didn't fully understand a situation?
 - Do I need to ask more questions?
- 4 – Thank every customer.
 - Did I thank the customers for: coming in, buying from us, for letting me serve them and for their patronage.
- 5 – Follow up with customers.
 - Did I call a customer to make sure he/she was satisfied with the results of his/her interaction with us?
 - Did I write a thank you note to a customer?

Download and read [GoalsHow-to.pdf](#) and [GettingOrganized.pdf](#).

Remember This.
<ul style="list-style-type: none"> • By setting goals and regularly reviewing them, you can make up to 10 times more money than if you don't write your goals.

Core Values

Consider This.

- | |
|--|
| <ul style="list-style-type: none">• What are “Core Values”?• What are your “Core Values”? |
|--|

“The actions of men are the best interpreters of their thoughts.” — John Locke

Core values are a person’s sense of character or integrity and what defines them. They are the guiding principles that you hold true to and help define the actions you take. They are the principles that matter most to you.

Following is a short list of core values and definitions for your consideration. See Core Values at a Glance Worksheet in *GettingOrganized.pdf* for more core values information.

Accountability - I take responsibility for my decisions at the individual & company levels.

Achievement - I aspire to the highest level of excellence in my products and services.

Action - I move quickly into action after wise planning. I believe in moving forward for maximum results.

Attitude - I believe that remaining positive and looking ahead are essential parts of achieving goals.

Balance - I strive for well-roundedness. I combine work, family, and recreation.

Boldness - I believe that taking calculated risks encourages growth and new discovery.

Challenge - I push myself to the limit, question boundaries, and continually advance.

Commitment - I keep my promises to clients, employees, and my family.

Community - I donate time, money, and resources to local charitable organizations. I build key relationships by supporting the community.

Leadership – I read about and study the best practices from leaders of business, government and religion to prepare myself to be an effective leader to those I influence.

Following is a list of core values from various businesses:

Integrity from cofc.edu

Adherence to the highest ethical standards in all our professional obligations and personal responsibilities.

Ownership from airnet.com

Set and achieve high standards of performance, pursue aggressive goals and persist in the face of obstacles to provide high value to our customers, our shareholders and to each other.

Teamwork from airnet.com

Value and respect the contributions of others. Demonstrate integrity, service and collaboration in every action

The Goals worksheet in your workbook is only the beginning. To improve yourself, you should be working on 6-10 core values at a time. Once you have mastered one, add another one to your regularly reviewed core values worksheet. Come back to your mastered core values at least once a quarter to assess your progress.

On the worksheet, Core Values at a Glance Worksheet in *GettingOrganized.pdf*, is a list of 48 core values for you to look through and define as you see fit. When you go through this worksheet, consider the provided core values or add additional core values as appropriate.

Homework

Post your chosen core values on the discussion board.

Rewards

Create a reward system for yourself. It will help you stay focused on your goals and keep you excited to continue accomplishing them. Start small. You might develop a three-tiered rewards system for achieving your goals.

1. After 10 days/times you did it successfully.
2. After 30 days/times you successfully accomplished the goal.
3. After the first quarter of accomplishing the goal.

After the first 10 days/times you may reward yourself with an ice cream, a desert, a CD, etc.

After 30 days/times you may indulge a bit more and reward yourself with a movie you have wanted to see or to go to dinner at a new place. Use whatever it is that will keep you motivated.

After accomplishing the goal in it's required time, reward yourself with a combination or something special - a new article of clothing, a book, some mp3's, etc.

Use the matrix found in your workbook (goal worksheet and core value worksheet) to chart your progress.

“People often believe that success only breeds success, but more often than not, success breeds complacency and arrogance and it can lower our competitive drive.”

—Gerhard Gschwandtner

Create and use a reward system to help you achieve your goals and you will be achieving more goals more often.

Study Journal

The purpose of a study journal is to keep important facts, figures, documentations close by when needed. “Knowledge carefully recorded is knowledge available in time of need.”^A Download and use the study journal documentation that goes with this lesson (see below).

To help you remember what you have learned in these courses and in life take a little bit of time each day and write something in your study journal. When you download and print out the file [*GettingOrganized.pdf*](#), you will see sample pages for a study journal. If you like, print out these pages, three-hole punch them, and place them in a three ring binder to keep and start your study journal.

You may choose to purchase a different type of binder and layout the pages as you like. These pages are good examples of what to do and how to do it. It is important that you develop your own style and process to record your thoughts.

Turn to your study journal as a ready reference. It is a companion to your “Life File” which we will discuss in lesson 2. There are many things that you should record in your study journal but to begin, start simple and ask yourself the question in the “Remember this” section below. If you can regularly answer this question, you are well on your way to improving your daily life.

- See [*GettingOrganized.pdf*](#)
- Download and read [*KeepOldKnowledge.pdf*](#)

Remember This.

Ask yourself this each day.

“What was the most important thing I learned today?”

Answer this question each day (M-F). Then review it on Fridays (?) and once a month and at quarterly reviews.

The important thing with answering this question is to get in the habit of writing and recording your thoughts. It also helps to discuss what you have learned.

What are some other benefits of keeping a journal in a business setting?

1. Document situations.
2. Record events for future use.
3. Capture ideas for later use.
4. To help you remember important events.

One way to make yourself more valuable is to be a better writer and be more organized! A study journal helps you achieve your goals and keeps the valuable information you

learn close at hand. When you find something of interest, cut it out and paste it into your study journal. If you keep it in a 3 ring binder, include a clear page sleeve where you can add information pertaining to the topic you are writing about. Keeping a study journal is a key part of getting and staying organized. It will make it possible for you to go farther and do more than if you don't keep one.

Daily Company Log

- The Company Log pages of *GettingOrganized.pdf* are a template for keeping daily logs.

The daily company log is a fast and easy way to communicate with your co-workers. To best make use of a daily company log, make sure that during each shift, before you leave, you write down important issues that need to be communicated to others. It may only be a simple matter with your computer system or a major issue about a customer problem. Below are two entry examples.

Date	Initials	Comments	Notes
6/12/05	<i>DCF JWS RWH John</i>	"The computer system was down from 9:00 am – 10:30 am. Was not able to run the morning reports. Afternoon please output them first thing."	<i>Will do-John</i>
6/13/05	<i>John DCF JWS RWH</i>	"Customer Joan Smith had her bag stolen out of her car while it was in our parking lot! The Police will be here to ask additional questions during second shift."	<i>Talked to police- RWH. Will contact you D.</i>

No matter what the issue is, big or small, good or bad, each person on each shift should report something about what happened. A good suggestion of what to say would be information on how you dealt with a customer or something from one of the worksheets you get from these classes.

Report on how your interactions went and what you did that went especially well.

You will also notice an area for signatures and for comments. This is also important for communicating with others. This is something that must be read, filled in, initialed and commented on each day by each employee.

If your workplace does not use any type of daily log, this is an excellent suggestion you can make. Be sure to include an example in your presentation to your employer. The easier you make it to implement, the better chance of success you will have. Your boss will think more highly of you – suddenly, you are more valuable to your business.

This log should be kept near the cash register or where your coworkers meet your customers most often. This document is also a great record of what is going on. Also, when you have review and training, you can use it to help guide the issues discussed.

To Do Lists 5-10 minutes

Show worksheet and discuss how to use it.

- The worksheets To-Do Lists in the file *GettingOrganized.pdf* are examples of To-Do List to be used in this section.

Printout and read how to keep the **to do list** from the file *GettingOrganized.pdf* which you downloaded earlier.

Included a few variations for you to use if you want. These are suggested ways to keep your basics organized. You may find that using a Franklin Planner works best for you. That is fine. Or you may want to look at www.plannerpads.com and learn about their organization planner. The planner pad is my favorite. You must get into the habit of organizing your activities, recording your progress and attainment. This list will help you do it. It is a must to getting organized and getting things done.

Job Descriptions/Replacement File

Having a detailed copy of your job description is eminently important to your job performance and success. As you have learned in the setting goals section, if you don't have it in writing it won't necessarily happen.

Though I have rarely seen a formal and detailed job description, it doesn't diminish its importance. Ask for a written copy of your job description. If none is available, which is likely, get as many details as possible and invest the time needed to write-up a detailed job description.

List the daily, weekly and monthly tasks. List criteria for accomplishing these tasks. Add to the list as you do your job on a daily basis. When it comes time to leave your job, pass on the document to your boss. This detailed document will now help the new employee get into the swing of a new job. This is called a "replacement file" — a good reminder, to your boss, of how valuable you were.

Following is a list of the Top10 Job Functions I consider to be key to every job description. These items should be added to the top of your job description.

Job Functions	Description
Goals	Learn how to set goals. 1. Record the goals to be accomplished 2. Establish criteria for accomplishing each goal, and 3. Provide a

	<p>timeline for obtaining each goal. If you are a supervisor, set goals with your employees. Record their progress and help them achieve these goals through regular reviews.</p>
Follow-Up	<p>Contact each customer that had a complaint or situation that needed your help. Follow-up to see if their issue was properly addressed. A simple follow-up is a valuable display of caring. And you will see loyalty surge.</p>
Improve Dress Code	<p>Look the part of the professional assistant that you are. Your image is very important to how your customers perceive you and your product. When you look top notch, you will act it and your customers will think of you as a resource.</p>
Smile At Those You Meet	<p>A smile should be the very first thing on your face when you meet anyone.</p>
Phone Etiquette	<p>When on the phone, smile while you talk. Show your enthusiasm as you talk with your customers. Be aware of your nonverbal expressions.</p>
A Life File	<ol style="list-style-type: none"> 1. A GAP file (Guidelines and Procedures—How to do what you do). 2. A love file (examples of <u>marketing materials</u> you think are especially effective). 3. A hate file (examples of <u>marketing materials</u> you think are especially poor—what not to do on your next project). 4. A swipe file (examples you want to incorporate in future <u>marketing projects</u>), and 5. A junk drawer (items to go through and file).
Product Knowledge	<p>Continuously learn about the products you represent and sell. Gather news articles, magazine articles, professional reviews, and customer testimonials. Assemble this knowledge and present it to your customers in special reports, how-to guides, review flyers, and testimonial sheets. Use it to support the sale.</p>
Introduction	<p>Greet your customers. Be sure to greet each customer as they enter your store. Give them your name and inform them that you are at their service and all they need to do is ask for you and you will be there.</p>
Look For Opportunities to Help	<p>Always keep an eye open to ways you can improve the way you do things. Ask yourself if this is the best way to accomplish this task. Ask for feedback from teammates and customers. Use the worksheets from this class to improve and to build value for your customers. Use your skills to help more.</p>
Thank Your Customers	<p>Thank your customers for their patronage, their purchases, their response to an offer, etc. Thank them all the time. Thank them for everything!</p>

Download [Top10JobFunctions.pdf](#) and add your job functions to the list. Keep it close

and review it regularly. This would be a good item to add to your goals list.

Download and read [*The 1,905—Karat Sapphire.pdf*](#). How will affect the world?

Review Planner

One way to succeed is to have regular employee reviews. If your boss doesn't understand the importance of a regular employee review, take it upon yourself to teach your boss what one is and how to perform it. Let her/him know how much you value regular reviews. This will show your supervisor that you care about self-improvement.

Go over the Review Planner Now. Explain how to fill it out and tie it into the goals worksheet—should be reviewed at least quarterly with your boss. Daily/weekly/monthly by yourself.

A wise employer understands that a review is a great time to focus on what the employee is doing that is right and to look at ways she/he can improve. Setting goals during the review is critical. The comments of peers during reviews is also important because it provides some third party feedback that would otherwise limit the ability to set goals in every important area.

Becoming an effective REP (Resident Expert Pointman)

You are the expert that your customers seek to meet their needs. Develop yourself to be the expert in as many areas of your business as you can. Let your customers know who these experts are and how they can use your expertise. For example, if you sell cleaning supplies, make certain you and others are experts on cleaning wood surfaces, on cleaning tile surfaces, on carpet and upholstery cleaning, and then use your expert knowledge as a resource for your customers.

When a new customer comes in to buy a product let them know your name, phone number, and schedule, and as their “REP”, how your skills will benefit them. You should list your skills on a flyer in the various areas of your expertise and give them the paper with listed skills and possibly a simple how-to-fix with your contact information.

This idea applies internally as well. If you use a certain variety of software at your company, find those who know the software best and use their knowledge as a resource to teach employees needing to learn these skills.

Learn who to turn to when different situations arise. “John is an expert in customer returns. Maria is one of our software experts; her specialty is Microsoft Office. Jason is our computer expert.” Learn what employee is the expert of what and how you can learn from them. Find out when they are available to serve.

As an expert, you must share your knowledge for it to be useful. This is what makes you so valuable. This is important because if an employee knows where to turn and knows that the other experts are willing to help, the workplace is more open and this fosters a

positive working environment. When you are left to yourself to solve all problems, time is wasted and productivity is not optimized. And customers end up having to wait where they should never be forced to wait to pay!

The REPs I've meet.

Story about buying snowshoes

My wife and I like winter sports. I like down-hill skiing and my wife likes cross-country skiing. She had no desire to do down-hill and I had no desire to do cross-country. That was a problem until we decided that we would try snowshoeing as a family activity.

But we knew relatively little about snowshoes so we went into the local sporting goods shop to look for more information on snowshoes. We picked up the few brochures that were available and looked up at the snowshoes for sell on the wall.

My first thought was that "Those are big, they must be the good ones." As I looked through the brochure, my next thought was, "Those are blue, I like blue. I think I would like that blue pair." A friendly salesman came up to us and introduced himself. He asked a few questions to assess our interest and ability. We exchanged some small talk but didn't commit to anything. After a few questions, we discovered a common interest, we knew his mother. We quickly warmed up and he went into how much he loved snowshoeing. He told us of his most recent trip, 3 days snowshoeing in Yellowstone's backcountry. He talked about what to look for in a pair of snowshoes, the pros and cons, intermixed with personal experiences. Before we knew it, we had spent an hour talking to him and getting educated on snowshoes.

While we didn't make an immediate purchase, by Christmas, we were the excited owners of two new pairs of the coolest snowshoes one could buy. We spent over \$500 on snowshoes at that store because we established a relationship with a salesman. There were more than 10 shops that sold snowshoes in our area, in addition to the possibility of buying them online. But we were motivated to reward this well-trained employee because we had developed a relationship with him. Such emotional bonds drive more sales than you can imagine.

Train yourself in all of the equipment (products and services) you sell. Then learn how to present that knowledge (information) to your customers. As you increase your knowledge of the products and services you sell, your confidence grows and you will be motivated to seek out the additional knowledge that will benefit your customers and the business you work for. The first step in making yourself an expert in the products and services you offer is to get and use the products you sell. Learn how to use them so you can show your customers how to better use them.

Story about Best Western in Rexburg

While writing Chapter Three of one of my books, I was sitting in the great room in the Best Western Cotton Tree Inn in Rexburg, Idaho when a couple, upon entering their room, spotted one of the Cotton Tree Inn employees. With a smile, the guest asked, "Do

you remember me?" The employee responded, "Yes, I remember you Mike." Mike wraps his arm around his wife and says, "This is my wife Jill, and we're back together ...

I sat there in amazement, witnessing Mike share details of his and his wife's personal lives with the inn employee. This employee obviously had made a favorable impression during Mike's previous visits. No one can tell me that customer service doesn't matter. Personal relationships between employees and customers influence customer buying decisions every day. Those businesses that understand this "fact of life" will receive a greater share of their customer's hearts, minds, and money. Case in point, although I have family in Rexburg that I can stay with, our young family usually chooses to stay in the Cotton Tree Inn because of the great atmosphere and the excellent service.

Story about Pier One Employee in Logan. So friendly.

On a recent Saturday afternoon we were looking for an indoor/outdoor table. In we walk to the local Pier One. Just as we got in the door, you know how it goes, you walk in and pause and decide which way you wish to start...up comes a young woman. She immediately noticed our young kids and asked our oldest (3 years old)...

"Do you want to see the soft toys we have that you can play with?"

"Yes," nodded our daughter.

"Come with me...I'll show you where they are."

I told my wife that I would go with them and she went off to do the shopping she wanted to.

She was brilliant. She immediately disarmed us and set us up to talk with her on her terms about her products! And we were willing, no less. She was so friendly, we happily listened to her sales pitch on the items we were looking at. She got a solid 5+ minutes of our time and her questioning got us talking about a number of the questions that were on our mind. She was an asset - a real REP.

As I walked around the store watching how the other employees interacted with customers...they smiled and said "hi" but they were nothing compared to the most valuable employee in the building.

Joni Hackney is on my list for the employee of the year!