



WorkExcellence® 5 Core Elements

Title Juan's Restaurants

1. Work System									
management system		purpose:		<i>ensure we are viable and healthy during and after shut down</i>					
Financial Management / Government Relief Management									
Safety Management / Regulation Management									
Staff Management									
Customer Management									
Communication / Meeting Management									
production system		purpose:		<i>deliver great carryout food and service</i>					
Work Types	Shut Down	Transition	Carryout	Ramp Up	Transition				
Location 1	communication	website	take orders	website	communication				
Location 2	meeting	staff	prep cook	staff	meeting				
Location 3	dining area	ordering	cooking	ordering	dining area				
	kitchen	kitchen	packaging	kitchen	kitchen				
	inventory	packaging	transaction	packaging	inventory				
	customers	process		process	customers				
		delivery							
time line		3/1		3/3		3/5		?	?
leadership system		purpose:		<i>to survive shut down during COVID-19</i>					

3. Work Measure			
Payroll	Government \$	Expenses / Cost	Orders / \$
Customer Satisfaction	Staff Retention	Morale	

5. Work PDCA	
1	weekly staff meeting (closed/carryout team)
2	weekly all staff communication
3	daily leadership meeting
4	daily financial review
5	daily virus briefing
6	

2. Work Plan			
	1	2	3
1	staff meeting planning		
2	staff meeting		
3	close down plan & execute		
4	marketing of carryout		
5	define carryout process & implement		
6	talk to banker / account		
7	set up safety guidelines & communicate		
8	review inventory and packaging		
9	delivery drivers		
10	go live		

4. Work Direction	
purpose of work	
<i>to survive shut down during COVID-19</i>	
direction of work	
1	<i>our teams safety is the highest priority</i>
2	<i>keep all employees on payroll as long as we can</i>
3	<i>switch to carryout and delivery of meals</i>
4	<i>same quality, same service</i>
5	<i>food and customer safety will not be compromised</i>
6	<i>we will pursue and gain government assistance</i>
7	<i>if you are sick or someone you know is sick, stay home</i>
8	<i>team members who do not have work should volunteer</i>
9	<i>we are a team and will get through this together</i>
10	<i>let's have a can do attitude, be creative and figure it out</i>
11	<i>let's work with the facts and support each other emotionally</i>



WorkExcellence® 5 Core Elements

Title Leadership Beyond Limits

1. Work System									
management system		purpose:		<i>ensure deliverability and viability, sustainability of wisdom</i>					
Content Management									
Client Management									
Financial Management									
Technology Management (Learning Platform/Zoom/Myquest/Teams)									
Meeting Management									
production system		purpose:		<i>create customer value through wisdom</i>					
Work Types	Innovation	Build	Market	Negotiations	Deliver				
Coach To Lead	brainstorming	outline	package	initial conversations	phasing				
On-Line Conversion	simplification	scope	creative	proposal	scheduling				
Funnel (existing / new)	connections	production	messaging	SOW	logistics				
Marketing	new application	reviews	creative	review	content prep				
New Creative	concept	knowledge harvest	message delivery	customization	communication				
Org Assessment		V1 / Draft	funnel	review	deliver				
On Location / Remote		share		agreement	follow				
time line		3/2		3/5		3/6		?	?
leadership system		purpose:		<i>maintain normal action & convert wisdom of online learning to scale - to drive value for clients now</i>					

3. Work Measure			
Revenue (hold / grow)	Grow & Maintain Resellers	Org Assessment Feedback	Client Feedback
Leads / Closing %	Completed Content		

5. Work PDCA	
1	weekly touch points with clients
2	weekly leadership org review
3	daily stand up
4	reset mini arrow after 3 weeks
5	sharing of mini partners
6	

2. Work Plan			
	1	2	3
1	expanding CTL		
2	creating Accenture proposal		
3	Anderson proposal & customization		
4	funnel messaging		
5	build connection with re-seller and network		
6	refinement of marketing messages		
7	penetrate current client to full set of offerings		
8	create new mid-level offering		
9	create frontline offering		
10	deliver organization assessment training		
11	expand online presence & deliver		

4. Work Direction	
purpose of work	
<i>maintain normal action & convert wisdom of online learning to scale - to drive value for clients now</i>	
direction of work	
1	make greatest possible impact
2	service offers can scale in all size organizations
3	make sales funnel more robust for growth
4	offer free services and content to help now - pay forward
5	people need positive influences and reassurance
6	take wisdom to be delivered online & remotely
7	make coach to lead more robust
8	expansion of content and training (now - levels)
9	create a system to maintain digital marketing
10	nurture relationship (new, partnership, and re-sellers)
11	aid in psychological safety (self / clients)



WorkExcellence® 5 Core Elements

Title Virtual Hair Salon

1. Work System									
management system		purpose:		<i>ensure a positive experience for all</i>					
Financial Management									
Meeting Management									
Technology Management									
Inventory Management									
production system		purpose:		<i>deliver products and services for our customers in this time</i>					
Work Types	Idea Generation	Ramp Up	Distribute	Transition	Normal				
Color/Gray Kits	brainstorm	setup website	take orders	kits continue?	regular appts				
Kids Cut Consultation	search web/social media	purchase supplies	build kits	open salon	still selling kits				
Color/Gray Consultation	prioritize ideas	social media blast	pickup orders	convert many to appts					
Style Consultation	select custom kits	salon messaging	grow distribution	leave kits available					
	select consultation	calendar app							
		payment methods							
		set pickup hours							
time line	Week 1	Week 2	Week 3	Week 4	Week 5				
leadership system	purpose:		<i>help people look beautiful</i>						

3. Work Measure			
Revenue	Client Satisfaction	# of Orders Weekly	Referrals

5. Work PDCA	
1	inventory check M-W-F
2	weekly team meeting
3	daily check on clients
4	return messages / texts
5	social media posts every 3-4 days
6	salon messenger channel

2. Work Plan			
	1	2	3
1	order supplies to make kits		
2	order color		
3	payment method		
4	calendar tool		
5	Zoom setup		
6	increase home internet speed		
7	get new iPhone		
8	setup website		
9	setup eGift cards		
10	client database / mass texting tool		
11	get custom stickers		

4. Work Direction	
purpose of work	
<i>help people look beautiful</i>	
direction of work	
1	we are in this as a salon
2	custom - same great service
3	provide for rent
4	stay healthy
5	help people feel good
6	protect their hair color investment
7	
8	
9	
10	
11	



WorkExcellence® 5 Core Elements

Title IT Service Co. - COVID 19 Pivot

1. Work System					
management system		purpose: <i>ensure teams have the tools/training/information to serve our clients effectively</i>			
Remote / Cloud Connectivity					
Human Resource / Safety					
production system		purpose: <i>meet our clients critical support needs immediately and accurately</i>			
Work Types	Lockdown	Pivot Offering	Stabilize	Transition	Normal (New)
24hr Critical Support	pause installs	define client needs	adjust sales projections	adjust safety plan	standard 24hr support
Customer Maintenance	setup remote work	define new offering	check/adjust team	prepare install team	regular maintenance
New System Installs	remote client access	adjust systems	client checkups	prepare onsite service	installs/service live
Onsite Service	switch staff to support	prepare/train team	5s pivot offering	purchase inventory	remote work offering
Remote Consultant	create health guidelines	market to clients	adjust pivot offering	assess client plans	
Remote Work Setup	aid client remote pivot	new sales started		adjust cashflow plan	
	consult client plans	cashflow plan		adjust sales projections	
time line	Week 0	Week 1	Week 2	Week X	Week Y
leadership system	purpose: <i>enable our clients to reach their goals through technology</i>				

3. Work Measure			
Revenue	Network Latency	Remote Support Calls	Customer Satisfaction
New-Installations-Completed	Onsite-Service-Calls	# Team w/COVID-19	Client Downtime

5. Work PDCA	
1	<i>daily team meetings</i>
2	<i>weekly business update/COVID19 u</i>
3	<i>weekly newsletter to clients</i>
4	<i>monthly all team meeting (state of the business)</i>
5	
6	

2. Work Plan			
	1	2	3
1	<i>create new sales projection</i>		
2	<i>setup check/adjust team meetings</i>		
3	<i>document current state pivot offering</i>		
4	<i>5S pivot offerings to eliminate waste</i>		
5	<i>train & distribute to team</i>		
6	<i>build COVID 19 business update</i>		
7	<i>check/adjust cashflow plan</i>		
8	<i>identify savings opportunities</i>		
9	<i>top 5 client checkups</i>		
10	<i>set remaining client checkups</i>		

4. Work Direction	
purpose of work	
<i>provide excellent IT support to eliminate unplanned downtime</i>	
direction of work	
1	<i>safety - keep the team healthy</i>
2	<i>predict and prevent interruptions</i>
3	<i>critical system support partner</i>
4	<i>provide a great workplace for our team</i>
5	
6	
7	
8	
9	
10	
11	



WorkExcellence® 5 Core Elements

Title Supply Chain - Food Supplier

1. Work System					
management system		purpose: <i>ensure workers are able to perform their jobs safely & effectively</i>			
HR / Safety					
IT Systems					
Finance					
Sales					
production system		purpose: <i>define the best process so that excellence is the standard</i>			
Work Types	COVID-19 Lockdown	Pivot to Retail / Pop Up Stores	Distribute Retail	Begin Transition	Build Restaurant / Wholesale
Retail 30%	restaurant sales drop	repackage for retail	increase health checks	speak w/restaurants	Serve old Clients
Wholesale 25%	oversupply of product	donate foods that can't transition to local charity before spoiling	re-plan routes	take restaurant orders	Increase Marketing
Manufacturer 25%	health/safety plan/PPE	communicate to team	balance staff hours	take wholesale orders	Relax PPE Guidelines
Restaurants 20%	1 month cashflow plan	secure add'l categories	daily top client calls	secure add'l inventory	New Cashflow Plan
	reduce staff hours	adjust processes	daily staff huddle	transition staff back to mix of business	Balance staff hours
	make plan w/creditors	use trucks-spot market	weekly staff update	communicate to team	Prioritize Creditors
time line	Week 1	Week 2	Week 3	Week X	Week X+1
leadership system	purpose: <i>show the team the critical role they play in people's lives</i>				

3. Work Measure			
Sales	Inventory	Gross Margin	Cash
Truck Utilization	# Sick Team Members	# New Retail Categories	# Loads on Spot Market

5. Work PDCA	
1	daily team huddle
2	weekly staff update
3	daily top client call
4	weekly client check-in
5	weekly production meeting - check/adjust processes
6	

2. Work Plan			
	1	2	3
1	secure additional packaging supplies		
2	secure additional retail categories		
3	adjust production processes		
4	optimize delivery routes		
5	bid/win truck hauling on spot market		
6	build weekly team update message		
7	secure additional PPE		
8			
9			
10			
11			

4. Work Direction	
purpose of work	
<i>provide top quality fresh foods for fine dining/cooking</i>	
direction of work	
1	top quality ingredients
2	safety
3	we own trucks, to provide the best service
4	provide our team with safe environment
5	take care of our team - growth, care and candor
6	
7	
8	
9	
10	
11	