

BE PROCESS-DRIVEN

Create systems and processes that are scalable and that support our ability to perform with consistency. Strong and clear processes are the foundation of our effectiveness.

Dan Sullivan, the founder and Guru of the Strategic Coach taught me the following steps:

1. Discover your **UNIQUE ABILITY**
2. **FOCUS** as much of your time and energy on doing exclusively that
3. Create a **PROCESS** that describes **HOW** you will deliver your unique abilities to customers
4. **GIVE IT NAME**
5. **CREATE A GRAPHIC** that describes your process
6. Mix, stir and repeat until you **MASTER** your process
7. **INNOVATE, CREATE** and **DISCOVER** new ways to add **VALUE** to your **PROCESS**.
8. Make more **PROCESSES**

Most of you will recognize the results of this brilliant advice that I learned 20 years ago. Some examples that we have implemented are: the Family Wealth Process, the Tamar Fink Legacy Process, the Policy Audit Process, the Tamar Fink Underwriting Process, the Gift Maximization Process, the BAPS Legacy Process. Tired of hearing the word **PROCESS**!?

What is the definition of a process? A series of actions or steps taken in order to achieve a particular end. It's actually easy to do. Think of anything you want to accomplish and make it into a process. Without processes what do we have? Chaos and confusion. The key to our future is repeatable processes that we develop, articulate and use to grow our business.

Think about your job and your responsibilities. Do you have a clear and effective process to achieve a particular end? What processes to you think your company needs or how can you help to improve the ones we have? Remember, your job is not just to work **IN** your job but work **ON** your job.

