FREEDOM

DSOA

week 5

THE SYSTEMS PLAYBOOK

THE SYSTEMS PLAYBOOK

Would a McDonald's employee turn to the shift manager and say, "How do you think we ought to cook the burgers today?" Probably not. Why change something that's worked well before?

Yet every day, the equivalent occurs in dance studios all over the world: teachers or admin staff play it by ear as they devise strategies or perform other important tasks. To eliminate this and expedite the growth and scaling of your dance studio, it's crucial to create a Systems Playbook —a set of written guidelines to achieve consistent operational and management excellence.

Why?

The reasons are countless. To improve business results, address underlying cultural issues, and realize your strategies to name just a few. Think about dance studios that operate out of more than one studio, with multiple employees. How can you ensure that staff perform work in one place as efficiently as they do in the other location/s?

In the world of scaling your dance studio, if you cannot put it on paper or record an effective instructional video, chances are you aren't performing your tasks as efficiently as you could and should be. Your playbook will help you to identify your dance studio's key areas of operations while providing a roadmap to maximize performance in those areas.

Your playbook development and deployment creates the means to improve your products and services, and also provides the template for consistent assessment to facilitate and sustain top results. That's one of the reasons the McDonald's cheeseburger you order in Miami, FL taste the same as those you get in Sydney, Australia.

Along with creating consistency, dance studios can also improve results. Through your playbook you will:

- Identify best practices and transplant them across their system
- Ensure resources and priorities are aligned to common goals
- Train new employees to perform within the guidelines, become a part of the desired culture, and develop shared values
- Ensure that important expertise, on which your studio results depend, do not walk out the door when employees leave the studio
- Ensure that your best business performance is replicable, meets high standards, and is not unique to one location or manager
- Accelerate growth by expanding into new facilities and getting them up and running quickly and effectively

Click here to watch your Sexy Systems Pro Class, with Dan Martell

WATCH

SYSTEMS PLAYBOOK TEMPLATE

Last Updated: June 6, 2019 (most recent date this doc was updated (mm/dd/yyyy)
Update By: Clint Salter (the person who last updated)
Status: Live (Live, Draft, Under Review)

T#001 - System Template

Purpose: To easily create new system templates for new systems and procedures. (The reason your reader is using this procedure. In a few sentences, offers a summary of what this doc is about. May also include a description of the "Definition of Done" of this task, i.e. how the user will know they've been successful in using this doc)

Title of First Process (include enough info to scan)
First Action Heading
Make sure you're using section heads often enough.

These section heads must be descriptive enough an intermediate user could scroll through, without reading Detailed Instructions, and still be successful in completing the proced

List heading of first step by step process.
- First bullet or procedure (template below)
- Use bullet points or #'s depending on the format of the doc
- This is for the novice user who needs to learn the details

Second Action Heading
As above...

Completion Checklist
- [ ] Does your document adhere to the 3 main sections (see below)?
- [ ] Could a qualified, new user successfully produce the result, just by using your doc?
- [ ] Have you added the procedure to the appropriate Playbook location?
- [ ] In the Playbook, when you click the doc label (should be linked), does the correct procedure document open up?

YOUR SYSTEM PLAYBOOK'S THREE MAIN AREAS

PURPOSE STATEMENT

This section is used to guide the creation of the procedure and ensure that all steps, templates, etc. are inline to support the main purpose of the document. It's almost like a mission statement for the document.

PROCEDURES

Each major procedure should have it's own section ie. using Heading 2 formatting. For each procedure, it's best to outline the tools required, the logins used and approach to completing each section.

1. Create a new procedure and add to R#001 - Business Playbook
2. Link newly created procedure from the Playbook number column
3. Create new procedure using the Creating and Modifying Procedure procedure.

COMPLETION CHECKLIST

The completion checklist is a way to list all the major items to verify that the work was complete. The main use case for this section is to add a new check anytime something fails in the system (as well as updating the system).

1. Verify that the procedure is properly linked from the Playbook and that the permissions are properly set for the team to access.
2. Update the Last Updated date if the procedure was modified.
3. Share the procedure with team members that will be required to use it.

CREATING FLAWLESS SYSTEMS IN YOUR STUDIO

DANCE STUDIO SYSTEMS PLAYBOOK					
REFERENCE	DATE CREATED	CREATED BY	DEPARTMENT	DESCRIPTION	LOCATION
FN001	15 Aug 2016	Clint	Finance	Following up skipped direct debit payments	*Link (Google Drive)*

Last Updated: 15 August 2016
Created By: Clint
Status: Approved

FN #001 - Following Up Skipped Direct Debit Payments
Purpose: To make sure that our customers will receive an urgent email every time their direct debit payment fails.

Process:
Office Manager will receive skipped payment notification from the direct debit company.
Check name in studio software and add a note to the file.
Office Manager to send email (copy CEO)
Skipped payment - Urgent (this should be a link to the email)
Add date when email was sent in customer file
If member updated their account do nothing.
If member does not update their account call them and give them a deadline on updating credit card details.

Checklist:
- [ ] Skipped payment notification
- [ ] Check name in studio software
- [ ] Send skipped payment email
- [ ] Follow up with a phone call if account is not updated.

EMAIL TEMPLATE

Hi [FName],

Hope you're well. We have just received an email from [Payment Processor] saying that your credit card details need to be updated within 24 hours to ensure your account stays active with us and your child can continue to enjoy dance classes. Maybe your card has recently expired or you have a new card?

Please update your payment details here and inform us once you have done so to ensure you update your account.

Please let us know if you have any questions by calling us on [phone number] or responding to this email.

Best regards,
[Office Manager Name]

PROJECT PLANNING

Every project within your studio - whether it is your recital, a product launch, a new website, or a marketing campaign - tells a story about your goals, team, timing, and deliverables, and it requires detailed project planning and management to get the story right. No matter the length or complexity of your projects, every story is based on a project plan. Project planning is the process of establishing the scope and defining the objectives and steps to obtain them.

Your project plan is a document that contains a project scope and objective. Learning how to develop a project plan doesn't need to be complicated.

Click below to view your Studio Freedom Project Plan bonus video masterclass

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Step One

UNDERSTAND THE SCOPE AND VALUE OF YOUR PROJECT

At its core, a project plan defines your approach and the process your team will use to manage the project according to scope. Every project - from recital to lesson planning - needs a plan. Not only does it go a long way toward keeping teams aligned in terms of scope and deadlines, a plan communicates vital information to all relevant team members. A plan is more than dates. It's the story of your project, and like any well-written story, there are components that make it work. Your project plan should answer these questions:

- What are the major deliverables?
- How will we get to those deliverables and the deadline?
- Who is on the project team, and what role will they play in those deliverables?
- When will the team meet milestones, and when will other members of the team play a role in contributing to or providing feedback on those deliverables?

If your plan answers those questions and educates your team on the project logistics, you're creating a viable, strategic game plan for your project. Use those questions as a gut check after you've created your plan.

step two

DO YOUR RESEARCH

Before you start creating a project plan, you have to stop yourself and make sure you know all of the facts. Take a deep breath, then dive into the documents and communications relevant to the project. Print the scope of work and all details that come along with it and assemble them. Be thorough, and understand the details so you can ask thoughtful questions before you commit to anything. At a minimum, you need to have a thorough understanding of:

- The goals of the project
- Your needs and expectations
- The makeup of your team and their decision-making process (i.e., how you'll review and approve your work
- Who is the project leader, and how available is he or she?
- Who are the additional contractors your team should be aware of?

step three

ASK AND ENCOURAGE A LOT OF QUESTIONS

Set some time aside with your team and contractors and ask them some questions about process, organizational politics, and general risks before creating a project plan.

Questions that may impact your project plan:

- How will you gather feedback?
- Who is the final sign-off?
- Is there a stakeholder we need to consider who is not on your list? (A teacher, photographer, costume designer?)
- What is the project deadline? What are the factors or events that are calling for that date?
- Are there any dates when you will be closed or not available?
- Will there be any meetings or points in the project where you'll want your team to present on the current project status?
- Has your team been through a project like this in the past?
- How did it go?
- Is there anything that would prevent the project from being successful?
- Is there a preferred mode of communication and online project planning tools?

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step four

CREATE YOUR PROJECT PLAN OUTLINE

Take some time to think about the project goals and how your team might approach the project. If you're at a loss for where to start, take a look at the questions at the beginning of this lesson to outline the who, what, when, and how of the project. Think about the tasks that are outlined in the scope of work and try to come up with a project planning and management approach by sketching something very high-level on paper. Yes, paper. All you need is a calendar to check dates. Make sure your sketch includes:

- Deliverables and the tasks taken to create them
- Your approval process
- Timeframes associated with tasks/deliverables
- Ideas on resources needed for tasks/deliverables
- A list of the assumptions you're making in the plan
- A list of absolutes as they relate to the project budget and/or deadlines

There will always be multiple ways to execute the work you're planning, and it's easy to focus on what the end product will do and what it will look like. Do yourself a favor and don't go there. ***Think about the mechanics of how it will happen, not what it will look like when it's complete.*** Doing this will help you to organize your thoughts, formulate what might work for the project, and then transform everything into a discussion. Take this time to build a simple project plan outline—it doesn't have to have all the details just yet. It may seem like a lot, but it all leads to building a solid, sustainable plan.

step five

TALK WITH YOUR TEAM

You need to be in constant communication with their teams. Starting a project must begin with clear communication of the project goals and the effort required to meet them. This comes with understanding you won't be the only one writing a project plan. Sure, you could try—but if you're interested in team buy-in, you won't.

It's also great to utilize those clever employees of yours to get their input on how the team can complete the tasks at hand without killing the budget and the team's morale. When it comes down to it, you need to know that the team can realistically execute the plan.

Running ideas by the team and having an open dialogue about the approach cannot only help you with building a project plan, it's also a big help in getting everyone to think about the project in the same terms. This type of buy-in and communication builds trust in a team and gets people excited about working together. It can work wonders for the greater good of your team and your project.

Step Six

WRITE YOUR FULL PROJECT PLAN

When you've got all the information you need and you've spoken to all parties, you should feel more than comfortable enough to put together a rock solid project plan using whatever tool works for you (Asana, Trello and Monday are great online options). Any good online project planning tool will help you to formalize your thoughts and lay them out in a consistent, readable way. Try to make a simple project plan—the more straightforward and easier to read it is, the better. No matter what tool you're using, you should include these features:

- Include all pertinent project info: Team responsible, Project Name, Delivery Date
- Break out milestones and deliverables in sections by creating headers and indenting subsequent tasks.
- Call out which team is responsible for each task.
- Add resources responsible to each task so there is no confusion about who is responsible for what.
- Be sure to show durations of tasks clearly. Each task should have a start and end date.
- Add notes to tasks that might seem confusing or need explanation. It never hurts to add detail!
- Call out project dependencies. These are important when you're planning for the risk of delays.

In addition to all of this, you should be as flexible as possible when it comes to how your project plan is presented. There is no absolute when it comes to how you represent your plan as long as you and your team understand what goes into one. Remember, people absorb information differently; while some people prefer a list-view, others might prefer to see a calendar. You can make all of those variations work if you've taken the steps to create a solid plan.

Step Seven

SHARE YOUR PLAN WITH THE TEAM AND WALK THROUGH IT TOGETHER IN A MEETING

After you've put all of that work into creating this important document, you want to make sure that it has actually been reviewed. When you're delivering your project plan, make sure you provide a summary that covers the overall methodology, resources, assumptions, deadlines, and related review times will help you to convey what the project plan means to the project and to everyone involved.

Explain the thought that has gone into the process of building the project plan, and open it up for discussion. A team meeting ensures that your staff will understand the process, and what each step in the plan means. Sure, you might have to explain it a few more times, but at least you're making the effort to help establish good project planning standards across the board and educate your team on how projects work.

Step Eight

PREPARE TO KEEP PLANNING

Sometimes projects are smooth and alarmingly easy to manage, and sometimes they are a complete nightmare that wakes you up at 3 a.m. every other night (it happens). Regardless, plans will change. With a good team and a clear scope of work, you're on your way to making a solid plan that is manageable and well-thought-out. In the end, having a solid plan is your best defense against project chaos.

If you can adapt your approach and your plan to go with the flow while calling out the appropriate risks, you'll find yourself in a great place. Otherwise, the daily changes will cloud your vision, and you'll focus on things that won't help your team or the project.

Click here to download your Studio Freedom Project Plan template

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Welcome

DANCE STUDIO HANDBOOKS

This lesson is all about streamlining communication in your studio to make sure that all of your dance families and team members are equipped with information in a timely manner - giving you more time to focus on the bigger picture tasks, rather than responding to dozens of emails each day asking the same questions.

Studio Handbooks are just one part of the customer experience in your studio, and while you will shortly have full access to our done-for-you Faculty, Concert/Recital, Student/Parent and Office Handbooks, let's first dive into Customer Service in a bit more detail.

THE 5 CORE COMPONENTS OF CUSTOMER SERVICE

Friendliness – the most basic and associated with courtesy and politeness.

Empathy – the customer needs to know that the service provider appreciates their wants and circumstances.

Fairness – the customer wants to feel they receive adequate attention and reasonable answers.

Control – the customer wants to feel his/her wants and input has influence on the outcome.

Information – customers want to know about your products and services but in a pertinent and time-sensitive manner.

SIMPLE ACTIONS = HUGE RETURNS

Presentation is the first step in making positive connections with your dancers and their families, and believe it or not what you wear and how you express yourself has a lot to do with how what you say is received.

This is true both inside the studio (teaching) and in your waiting or reception area. Spend some time designing a uniform (or a variety of uniform options) and clearly set out personal grooming expectations for your staff that communicates your **standards and values.**

On the surface level, great customer service will always begin with the small gestures:

Smiling – there is nothing like a smile and pleasant face to greet a customer, especially if he/she has a complaint. A smile and polite conversation can immediately disarm a disgruntled dance-mom.

Eye contact – always look into your customer's eyes. Directly address customers.

Be attentive – when listening to a customer, slightly lean towards your customer and nod your head to show you are listening.

Tone of voice – always convey friendliness and amicability. Try not to raise your voice in frustration or anger no matter how difficult or a customer may be.

Posture – slumping in a chair or leaning against a wall while interacting with a customer are sure signs you are not giving them your full attention. Your posture should express interest, friendliness, and openness. Lean forward, face the customer and be conscious to avoid distractions so that they know you are interested.

DEALING WITH DIFFICULT DANCE-MOMS

If your dancers or their parents are unsatisfied, it's up to your customer service skills and training win back their support and continued loyalty, and to rebuild a positive working relationship.

1/ LISTEN

It is of primary importance when dealing with an unsatisfied or complaining customer to listen attentively to his/her complaint, gripe, frustration or grievance. Be patient, attentive, and friendly.

2/ EXPRESS YOU ARE SORRY

"We are sorry for this mistake/problem."
"We are terribly sorry for this inconvenience."
"How can we work to solve this problem together?"
"I can imagine how frustrated you are."

3/ DO NOT ARGUE OR INTERRUPT

This will only worsen the situation, especially if the customer is angry. Let them speak before you try to discuss with him what has happened.

4/ DO NOT LOSE YOUR SELF-CONTROL
If you stay relaxed, customers will calm down.

5/ POINT OUT FACTS
Listen carefully – and write everything down. Do not make any comments until the customer is finished talking.

6/ ADMIT THE PROBLEM
If you can suggest a solution, do it. If not tell the customer what actions you will take and what actions will follow. Never make the mistake of promising something you are not able to follow through with.

7/ INVOLVE THE CUSTOMER IN PROBLEM SOLVING
Suggest the customer alternative solutions, if they exist. Customers appreciate the opportunity to choose the ways of problem solving.

8/ FOLLOW-UP
Make sure that the promised measures are taken. If you do not fulfill what was promised and ignore the customer's complaint, the problem will grow.

9/ GIVE THE CUSTOMER A "WAY BACK"
Sometimes customers are wrong. You should let them leave with dignity, without feeling embarrassed.

10/ BE OPEN-MINDED
From the very beginning you should believe that the customer may be right. Always be open minded toward the customer's opinion, making them feel comfortable and that they deserve to be listened to.

ROLE PLAY EXERCISE

Dealing with difficult customers and conflict in the studio is one of the biggest - and most stressful - challenges you and your team will come up against, and using role play is a very powerful tool in being prepared and confident when a tricky situation arises.

A role-play exercise is where your team acts out an imaginary scenario that closely mirrors a situation that could occur in their role. Come up with 3 scenarios (for example, a disgruntled parent who missed out on recital tickets, or a grandparent who wasn't notified of a canceled class) and observe your team role-play the scenario and solutions.

PROBLEM-SOLVING CHECKLIST

When you listen to the customer's complaint you take responsibility to solve the problem.

- Listen without interruption and with full attention.
- Behave without aggression, and without arguing.
- Do not extend excuses for the problem, and thank the customer for drawing their attention to it and helping solve it.
- Express empathy and full understanding.

Customer service problem solving involves:

- Asking necessary questions to get more complete information and completed picture of a situation.
- Finding out exactly what the customer needs you to do for them.
- Explaining first what you can do, and then gently add what you cannot do.
- Discussing in detail all opinions, and then decide what needs to be done.
- Undertaking immediately what was discussed.
- Checking the result to make sure the customer is completely satisfied.

FROM CUSTOMER SERVICE TO CUSTOMER EXPERIENCE

Your staff may have the skills and know-how to interact with your customers.

But what strategies can you employ to go the extra mile and focus on the customer experience?

This is what will be the biggest factor in making your customers happy before they come to you with problems.

Get personal. Your customers want to feel like they have access to real people, not bots and FAQs. Offer more than just automated email responses, and do not let your telephone prompts or website send them down a rabbit hole. Take full advantage of social media (such as Facebook, Twitter and Yelp) and write responses when your customers post on your page. Post photos and bios on your website. This shows your customers that you are real people working on in their best interests.

Be available. Part of the personal touch is making sure your customers can reach you. Set your service hours for early and late as needed, and set KPI's to ensure all emails and phone calls are returned within 12 hours. This is SO crucial - many studios leave their calls and enquiries unanswered, and driving those customers directly to competitors.

Cater to your customers. Make sure you are fully meeting your dancers' and their families' needs. Consider assigning staff liaisons to specific customers so they can build a relationship. Offer VIP treatment for your regular customers to let them know they are appreciated. What special services might your customers like? You can set up focus groups, interview customers, or run a survey to get ideas.

Create communities. Your customers will feel even more valued if you treat them as valued members of a community. You can bring various customers together in numerous ways, including social media and studio events.

STUDENT PARENT HANBOOK

FACULTY HANDBOOK

CONCERT RECITAL HANBOOK

OFFICE HANDBOOK

MY BEST,

Clint

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