

Bambi Crozier's List as discussed on the Town Hall Academy, Episode #59

<http://remarkableresults.biz/a059>

I recently went through my owner's actions and broke them down by daily, weekly, monthly activities. It really helped focus me and make sure I was hitting everything – effectively. There are so many things that should be done – and many I realized could be delegated. I also realized I lost a lot of time in areas that brought very little revenue to my bottom line.

There are some tactics I use that help me organize my daily, weekly, monthly tasks. First, I highly recommend a solid ROUTINE. Before I created my list of things to get done, I found myself constantly behind the 8 ball. I would wake up middle of the night wondering if I paid the sales tax bill, if I ordered parts I needed the next day, did I make the bank deposit, am I ever going to have a moment to have that conversation with that technician about his computer time? There are a thousand things that happen each and every day... and there is no way to actually accomplish any of it with excellence if you don't have a ROUTINE.

So, I break down my daily, weekly, monthly activities in to a ROUTINE. That routine is based on the 5-day work week. I can handle emergencies during each day – but I must accomplish THREE tasks every day within my routine. I do that with PLANNING which is my second secret to success.

PLANNING requires forethought, design, time, and a capability to implement. Planning was something that I found impossible before my routine. I was running from one hot mess to another. I was exhausted and felt like I had been super busy – but the results did not show I had actually accomplished much. The results being money in the bank, cars out the door, kids to practice on time, dinner on the table before 8pm, etc. DAILY planning, WEEKLY planning, MONTHLY planning, ANNUAL planning, and your five-year plan are all important. In that plan, I list three things – that's it – three things that I must accomplish each day. Do those things FIRST. These are usually the things that take the most time for me to pull together data or think about. They may be tough conversations that I dread having but must have. It may be sending out a mailer that I have been procrastinating on because I hate it. Maybe it's locating parts for a car that's been at your shop just a little too long. Maybe it's calling that customer that left you a ratchet 1 star review – and you know her review was BS but you have to pony up and handle it as a true leader would handle it. Based on your ROUTINE – handle each big rock and let all the other stuff just slide around it throughout the day.

In addition to planning and routine, you must take care of yourself daily. We lead stressful lives trying to spin all the plates just right. We must de-stress and re-center ourselves. We

must not lose our focus and our foundation because someone traveling didn't plan their car care correctly or an employee got sick and now we are working late for them. Whatever that is for you – may be different than it is for me. I like quiet time away from all the chaos in a corner of a bookstore or coffee shop. When super stressed, give me a thousand dishes to wash – but don't you dare bring me 7K pounds of laundry. SELF CARE on a daily basis is critical. 4am Jesus calls in the closet... bible verses penned on my closet walls... prayer time on my knees and sometimes face & palms down repeating scripture that I need to remind myself of... is what it takes. My daughter, she takes to the punching bag in the garage. My husband, he jumps on his motorbike and rides. My son, jumps on the trampoline until he can't feel his legs. Whatever it is for you – you have to do it... and do it with your entire being. Get your time in... Maybe it's sunrises on the porch with a cup of coffee and nothing more than that. You must have something that centers and focuses you – every day.

Finally, you must look at your metrics every day. Where are you to your goals, where is your cash flow. What do you need to touch to improve these metrics...

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Bambi Crozier Routine:

- 5th of the Month: Review P&L & Income Planning, Review & Pay A/P, Review & Collect A/R
- 20th of the Month: Review Goals and Plans to Achieve them for next month
- Monday – Manage the business
 - Second Monday – Employee Reviews
 - Weekly Review Stats (ARO, GP, CC, Billed Hours, Sold, Efficiency)
 - Review Daily Recap Results from Mary
 - Review Bank Deposits
 - Spot Check Tech Inspections, QC Inspections, RO Profitability, Declined Work
- Tuesday – Product / Growth
 - First Tuesday Review Training Plan & Employee Progress
 - Second Tuesday – Review Equipment Needs and ROI
 - Third Tuesday – Review Processes, Policies, Procedures
 - 9am Writer Meeting (Results, Profit, RO, Workflow, Employee Feedback)
 - Emailed Daily Morning Battle Plan from Jayson to Bambi
 - Review Daily Recap Results from Mary
 - Review Bank Deposits
 - Spot Check Tech Inspections, QC Inspections, RO Profitability, Declined Work

- Wednesday – Marketing / Communication
 - First Wednesday: Review Referral Program & Announce Winner
 - Second Wednesday: Review Marketing Calendar
 - Weekly Thank You Cards for last week clients
 - Review Daily Recap Results from Mary
 - Review Bank Deposits
 - Spot Check Tech Inspections, QC Inspections, RO Profitability, Declined Work
- Thursday – Partnerships
 - First Thursday – Review OSHA Items / Safety Plan Meeting Notes
 - Second Thursday – Review Legal Requirements / Needs
 - Review Daily Recap Results from Mary
 - Review Bank Deposits
 - Spot Check Tech Inspections, QC Inspections, RO Profitability, Declined Work
- Friday – Culture / Recruitment
 - Second Friday – Review Incentive Plan
 - Third Friday – Review Pour in Training for Inner Circle
 - Set Weekly Battle Plan for next week
 - Review Recruiting actions and next steps
 - Review Daily Recap Results from Mary
 - Review Bank Deposits
 - Spot Check Tech Inspections, QC Inspections, RO Profitability, Declined Work

DAILY

SELF CARE

- Spiritual – Morning Prayer and quiet time
- Physical – Exercise, Dishes, Wash the Car, whatever relieves stress

METRIC REVIEW

- ARO | GP | NP | CC | Billed Hours | Revenue to Break Even

PLAN FOR TOMORROW

- Every day you must plan for the next day. Look at your ROUTINE and put together your three tasks that must be done.
- Every Friday look at your results and plan for the next week. Where do you need to focus your energy? – DO IT!

Bambi Crozier along with husband Neil Crozier, own Car Clinic in Lowell, AR