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OUR EDITORIAL FOCUS

Our country was founded by visionaries who believed in free enterprise through individual determination. We support that spirit and hold that the future of our area lies in the growth and development of small businesses and the efforts of entrepreneurs. We are dedicated to supporting and promoting that growth.

St. Louis Small Business Monthly is St. Louis' locally owned business publication, bringing business tips, strategies and analysis to the presidents, CEOs, owners and top executives of 16,000 businesses in the St. Louis Metropolitan region. SBM, founded in 1988, publishes every month and also provides information at www.SBMon.com and through a variety of business-related forums and events.

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"It's very nice when people walk by and say,
'you built that house.'"

Mike Lewis
Lewis Homes



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Employees Making A Difference

Great Employees = Great Companies

Legendary football coach Bill Walsh had a philosophy about players: "Great players," he said, "could overcome a poor game plan, poor preparation and a mediocre coach. Less talented players, on the other hand, could destroy a great game plan, great strategy and a great coach."

I think the same is true in business. In the 29 years I've been reporting and writing about business, there has only been one key ingredient in all of the successful companies I've written about. That ingredient: people.

Great employees can take a mediocre business to new heights. There is no question about it. I've seen it happen first-hand. Mediocre employees, on the other hand, can take a thriving company into bankruptcy.

In his book, *Good to Great*, Jim Collins advises owners to get the right people on the bus and in the right seats. I will take that concept one step further. If you can just get great people on the bus, they will find the right seats and even steer the bus in the right direction. In this current business climate, finding the right people is the No. 1 challenge facing business owners in the upcoming decade.



One entrepreneur learned this lesson directly. When John Marcus purchased Matthews Book Company years ago, he faced numerous obstacles, including financials that had the company near bankruptcy. He knew he needed to change and change rapidly. He decided to change his personnel.

He stopped hiring skill sets and began hiring individuals with great work ethics and one-of-a-kind values. He didn't change much else. His new employees took the company to new heights. Together, the company went from \$750,000 in sales to \$180 million.

Marcus isn't the only business owner with great employees. When journalists write stories about companies like Matthews Book Company, they typically only highlight the business owner. The owner gets all the credit for the company's success.

We've decided to change that. On pages 22-26 of this issue, we will be profiling some of the area's key employees, employees who are helping to make their companies great.

This is one of my favorite SBM sections because these employees, who often go unnoticed, play such a vital role in the success of area companies. These employees have always been a behind the scenes force. Now it is time they get the public recognition they deserve.

Congratulations to them all. If you know employees who are making a difference in a St. Louis company, please email me at ron@sbmon.com. We want to share their stories.

Ron

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How To Keep Prospects Engaged



When engagement increases, so do sales. If you lose sight of your game plan following initial contact, you could lose everything. And you can't afford that.

Cultivating a relationship with a prospect involves time and effort. But there are some simple ways for you to grab their attention and maintain engagement.

1. Ask the unexpected.

Too many times if you ask canned questions, your prospects will lose interest in you. By asking them an unexpected question, you can truly get them thinking. Successfully engage with them at a much higher level, and the conversation — even the relationship — will change.

2. Involve more people.

Why are you talking to just one person at a company with which you want to do business? Instead, talk to four or five. If you want to keep a prospect engaged, get multiple people participating. Spread your tentacles throughout the organization.

3. Schedule meetings with a purpose.

Don't just schedule meetings haphazardly: "Oh yeah, let's get together next week at 2 p.m. or 10 a.m., whatever it might be."

That does you no good. Schedule meetings with a precise purpose so that prospects know your intent and understand they're going to be challenged on their thinking. This suggestion links to the idea of having a clear Call to Action.

4. Ask for their opinion.

Opinion is one of the most beautiful words. People always want to share their opinions.

What I love to do is ask, "Well, what's your opinion on this? Let me get your insights on this. I want to understand more clearly how the industry's moving and what you think about it."

When you ask for a prospect's opinion, don't just ask for their opinion about your product. That's stupid. Ask for their opinion about something bigger in the industry, in their supply chain, or in the whole scope of things. In fact, when you start placing value on what they're sharing with you, it's amazing how much more information they're going to share with you.

5. Share industry insights.

If prospects see you as part of their industry, as part of their world, they're going to be much more receptive to staying engaged with you. They are certainly going to be more receptive about talking with you.

If you just talk in general terms, your message is irrelevant. But if you start using their vocabulary and their language, and you talk about the issues that are happening in their world, you can make a big impact.

6. Answer their questions.

This recommendation is so obvious, but what I love about it is that a prospect may share a question during your first call.

Then, you can come back and say, "Hey, let's get together. I want to talk. And I've got some answers to those questions you had." Or you can say, "That question you asked

prompted me to think of some other questions that we should really address. I want to get your opinion on them."

You're valuing them and you're keeping them in the loop.

7. It's not about you.

Never start a call talking about yourself or your company. It's not about your (or your company's) achievements.

However, it's okay to say, "Hey, I've seen this before," or "I've been able to work with companies similar to yours that have the same challenge." It's okay to say these kinds of things because they are confirming statements.

It would be very different to sit there and say, "Oh, we've been in business for 65 years, and we've done this and we've done that." Who really cares? Prospects can go to your website and see that information.

It's okay to offer a confirming statement — and that's it. Focus more energy and time listening, asking questions, and having a conversation.

8. Use subject matter experts.

I love leveraging subject matter experts. Suddenly, you're not just a salesperson, but you're bringing in other people.

For example, you set up a follow-up call, and you say, "Hey, I'm going to bring in 'so-and-so' from our labs or this tech person, and they're going to share some additional insights with you." Then, invite them to bring in other people.

What does this strategy accomplish? It makes the meeting seem more important. It also makes the meeting more valuable because you're going to bring more input to the table. ■

Mark Hunter, of The Sales Hunter sales motivation blog, is the author of "High-Profit Prospecting: Powerful Strategies to Find the Best Leads and Drive Breakthrough Sales Results."



ASK THE BANKER

Presented by:



Should I Lease Or Buy Equipment?

The answer to this question depends on many factors. Companies often don't have enough capital to purchase equipment outright, and even if they do, it doesn't always make financial sense to do so. While some companies choose to pay cash for their equipment, this option ties up capital and could lead to cash flow issues. There are pros and cons to both options:

The Pros of Buying Equipment:

- Equipment depreciates, which could lower tax liabilities.
- Business owners are free to use the equipment however they choose.
- For business owners with good credit, the equipment funded with the loan could serve as collateral.

The Cons of Buying Equipment

- For loans used to purchase equipment, lenders may require down payments.
- Loans increase the liabilities on the balance sheet, which could impact the business borrowing more money in the future.
- Lenders may require collateral beyond the equipment being purchased for the loan.
- For outright purchases, a large sum of cash is needed to purchase equipment, which depletes capital reserves.
- Equipment often becomes obsolete, causing the equipment's resale value to decrease.
- Business owners are responsible for the overall costs and repairs.

The Pros of Leasing Equipment

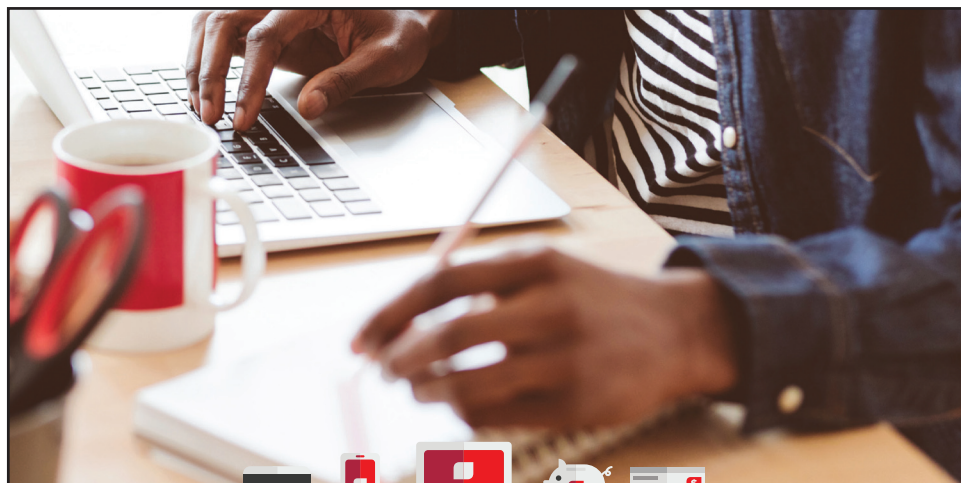
- Down payments are usually smaller (or none) for leasing vs. financing.
- At the end of the lease agreement, the business owner can extend the lease, buy it, or return it.
- In many equipment lease agreements, the leasing company is responsible for repairs.
- It may be easier for business owners with minimal credit to obtain the equipment they need.

The Cons of Leasing Equipment

- Leasing is often more expensive than purchasing equipment with cash.
- Depending on how the lease is structured, business owners may not realize any depreciation for the equipment.
- It's possible for the lease payments to outlive the usefulness of the equipment. The business owner must continue to pay or to break the lease, which is costly.
- Under new rules of accounting, operating leases may appear on the balance sheet as a liability. ■

Answers provided by Todd Smith, Senior Vice President, Commercial Group Lending Manager at Simmons Bank. He can be reached at 314.569.7242 or todd.smith@simmonsbank.com. The views in this article are those of Todd Smith individually and do not reflect those of Simmons Bank.





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MASTERING LINKEDIN

BY KATHY BERNARD

Use A LinkedIn Poll To Engage With Your Prospects

Wonder what potential customers think about industry trends or your products or services? Wonder know more! Ask them in a free LinkedIn poll.

You can create a poll by clicking into the "Start a post" box from your LinkedIn desktop or mobile homepage and then selecting the "Create a poll" icon. Simply fill in the boxes requesting each question and answer option. Ask up to 30 questions (140 characters each) with up to four responses per question.

Use a LinkedIn poll to learn who may be passionate about what you offer or to gain feedback about product launches or changes. Or use a poll to see who might be willing to participate in more in-depth surveys outside of LinkedIn.

Also, ask more general questions to engage with your network. For example, ask people

about their go-to local barbecue restaurant, greatest pet peeve, or favorite Ted Drewes' blizzard. Everyone has opinions about such topics!

You can post the poll from your individual account or as an admin of your company page or group page. Your poll can last 1 day, 3 days, 1 week, or 2 weeks.

Include topical hashtags, such as #mechanicalengineering, #stlouis or #smallbusinessowners to ensure that the right people view your poll.

If you want to know what your prospects are thinking, ask them on LinkedIn, then use that knowledge to grow your business. ■

Kathy Bernard (kathy@wiseru.com), CEO of WiserU.com, is a St. Louis-based LinkedIn expert/trainer who equips businesses to maximize LinkedIn for sales, marketing, or fundraising.



ENTREPRENEUR'S TOOLBOX

BY JAMES CANADA

Performance Ratings And The Pursuit Of Individual Excellence

As the name indicates, the bottom line of any Results Based Performance system is the actual bottom line: Getting results in terms of People, Knowledge, Sales, Service, and Culture (our five Mega-Processes). But from a practical perspective, on an employee-by-employee basis, you need another way to quantify individual performance.

This is where tiered performance ratings are vital in letting each employee know precisely where they stand in the eyes of their manager or employer. Such a grading system can be structured in a variety of ways — each with its own benefits and limitations depending on the scenario.

For instance, to assess Engagement Updates (i.e., field assignment reviews), you might choose to implement a three-tiered scale, using letter ratings as follows:

E: Exceeds Requirements — Employee acts as a role model for coworkers on this engagement.

M: Meets Requirements — Employee fully meets all expectations.

N: Needs Improvement — Employee performance exhibits weaknesses that need to be addressed.

Experience dictates that a relatively smaller amount of data from one engagement serves as a better basis for distinctions among those three levels. However, that might not be enough information to ensure that reviewers can consistently assess performance over an extended period, involving multiple engagements or roles.

On the other hand, a five-point rating scale might provide a more accurate long-term assessment by forcing the reviewer to

make finer distinctions in performance. This works particularly well when the rater has access to a large amount of information from multiple sources, as is the case when evaluating overall performance at the end of the year. A typical five-point scale might look like this:

5: Far Exceeds Requirements — Employee performance significantly and consistently exceeds all expectations and is of highest quality and value.

4: Exceeds Requirements — Employee performance usually exceeds all expectations.

3: Meets Requirements — Employee performance fully meets all expectations.

2: Need Improvement — Employee performance meets some, but not all expectations. There is a need for improvement or additional experience.

1: Unacceptable — Employee performance does not meet minimal expectations.

The use of different scales for Engagement Updates and Annual Performance Reviews means that you will not "average" the ratings to come up with a final grade. Instead, you must use your judgement to translate data from various sources throughout the year into an accurate overall assessment. No matter the methodology, it's important for the process to be completely transparent. ■

James H. Canada is managing partner/CEO for Alliance Technologies LLC, ITEN mentor and author of "Corporate to Entrepreneur: Strategies for Success." Contact Jim at james.canada@alliancetechnologiesllc.com, 636-734-2337 or www.alliancetechnologiesllc.com.



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Measuring Performance And Enhancing Engagement In The Post-COVID Workplace

As small businesses rebuild their teams, the realities of the “new normal” are stretching us as leaders. For example, most organizations adopted hybrid and remote work models to get through the Covid-19 crisis. However, what we may have thought was temporary is now here to stay. Upwork estimates that 22% of the American workforce, or 36.2 million workers, will be working remotely by 2025. There is no going back to the way things were because added flexibility has worked for a lot of people. Now, companies must make changes to remain competitive and retain talent in a tight labor market.

Many leaders may be wrestling with how to optimize productivity, growth and engagement in this new business environment. Historically, some managers used FaceTime and time-in-office as proxies for productivity instead of measuring actual performance. Shifting your culture to an outcome-based performance model can be a game changer for the hybrid and remote workplace. In this paradigm, productivity is now measured based on results. For leaders, our job is to help people understand that we are more interested in the outcomes they produce versus whether they are in the office five days a week.

So, how do we implement this shift? Here are some best practices you may want to consider:

■ **Set cascading goals.** Start with top-line company goals and break them down for employees. This process doesn't have to be complex or difficult; it can be fairly simple. In fact, the simpler the better. Cascading goals help employees understand their respective roles and how their individual contributions fit into the bigger picture. Setting such goals also helps managers and employees set priorities, ensuring that everyone is aligned and doing the right things right.

■ **Focus on keeping your most important connections.** The relationship

between front-line managers and employees is critical. Nothing replaces it, no matter what else you do. Interactions between managers and individual team members are crucial in making sure your remote or hybrid employees

are feeling connected and not forgotten. Managers should make it a practice to schedule one-to-one meetings with each employee. These can be at the right cadence for your teams but should not be more than a month apart.

■ **Set and keep regular team meetings so the team feels connected.** Depending on the situation, you may choose to have collaboration days in the office for the entire team to stay connected. Set this schedule and stick to it. These meetings will be important for your team members.

■ **Establish outcome goals and follow up on them.** You should be checking in on progress and general outcomes for the success of each department. Quarterly check-ins on progress should be a regular practice; if not quarterly, schedule them every six months. Depending on the work of the organization, an annual roll up on performance may make sense as well. The key is that feedback is an ongoing conversation, not a once-a-year event. Consistent, effective communication helps people correct course in the moment and, in turn, drive strong performance.

■ **Find quick and easy ways to connect.** If you use Microsoft Teams (or software



like Teams), send a good morning message every day. Additionally, programs like Survey Monkey are inexpensive and allow you to check the pulse of your organization. You can easily send out a one- or two-question survey every week or every month to find out how people are feeling and give them a chance to share ideas and concerns. Such feedback is a powerful tool for leaders to gain insight into their organization.

■ **For larger organizations with several layers of management, explore skip-level touch bases that allow managers to go deeper into the organization and gain exposure to employees they don't ordinarily meet with.** Another effective tool is cross-sectional meetings where 25 to 30 employees gather virtually or in person for an open-forum discussion to ask and answer questions.

Business performance is the ultimate indicator of how things are working for your company. Closely monitoring outcomes and tweaking accordingly can achieve the best of both worlds: high productivity and highly engaged employees. ■

Julie Tuggle-Nguyen is EVP of Human Resources, Midwest BankCentre.

Write Your Own Introduction

Whenever you are scheduled to speak, in person or virtually, someone should introduce you. An introduction is an integral part of a presentation.

The speaker is responsible for writing the introduction. The emcee should read it as if *he or she* wrote it. Too often, that person will grab your bio from the internet. No one cares how many kids you have, where you vacation or (except in St. Louis) the high school you attended.

This is a “*speaking* opportunity” for emcees and a moment for them to shine. Providing a great, relevant introduction will serve them well.

People attending events are investing

■ Time

■ Sometimes money

■ Opportunity costs (They could be doing a number of other things.)

An introduction sets the stage for your presentation and should answer three questions:

1. WHY this subject?

■ Describe why the topic is important to the audience. Example: “*The fear of public speaking holds many people back from reaching their potential.*”

2. WHY this speaker?

■ Do not be modest. Here is where you establish your credibility: years in your industry, degrees, special awards, book titles, etc.

■ It is better for the person who is making your introduction to state great things about you. If you share those same accomplishments, you could come across as bragging and turn the audience off. Example: “*Our speaker's books are purchased internationally and receive rave reviews.*”

3. WHY now?

■ Share reasons why the topic is important to the audience. Example: “*Speaking opportunities are business, career and leadership opportunities. If you fear public speaking--or just want to be a better presenter--our speaker has a message for you.*”

Send your introduction to the emcee immediately after being awarded the speaking gig and before they have invested time and effort writing one for you.

Do so and your presentation will be - NO SWEAT! ■

Fred Miller (fred@NoSweatPublicSpeaking.com) is a Speaker, International Coach and Author. Businesses and individuals hire him to improve their public speaking and presentation skills.





The Impact Of Humble Leaders

While the charismatic leader receives considerable attention, I argue that humility is a more potent leadership quality than charisma. The pressure on the charismatic leader to remain “on” reduces the time required to step away from the business. What happens to an organization if a charismatic leader leaves? What happens to the organization? Humility entails acknowledging the impact of each action on the company and its customers, employees, and their families. If a leader is mindful, the trait of humility can anchor into a healthy capacity to connect with others.

A modest leader’s primary emphasis is on the company and the people under their leadership. Humility stems from a sense of respect for the effort it took to get where they are, which may translate into a sense of regard for those who are also working hard to succeed. The modest leader considers their followers as peers. They view the call to leadership as a serious obligation to guarantee the success of the entire organization, not just their own.

Rather than worrying about how you seem as a leader, focus your passion and energy on establishing a strong company and let the outcomes speak for themselves. Accept responsibility for any issues that occur and work with your team to resolve them. Leverage those around you who may be wiser than you. Consider the organization’s sustainability by developing procedures to maximize the performance of outstanding individuals to accomplish desired goals. Finally, acknowledge those who achieve desired objectives; make it about their abilities, not your leadership.

While the charismatic leader receives a majority of attention, it is typically the modest leader who engages the team and achieves the outcomes necessary for the organization’s long-term success. ■

Jonathan Jones (Jonathan.jones@vistagechair.com or 314-608-0783) is a CEO peer group chair/coach for Vistage International.



Powerful Storytellers Reveal Transformations; Feeble Marketers Spout Meaningless Cliches

A few weeks back I came across a post on LinkedIn by a guy who’s tired of the word “transformation.”

He wrote, “... why is it that nearly every B2B enterprise software website promises to transform [fill in the blank]? ... The answer is because everyone else says it, no matter how misleading it may be. In my experience, I can count the number of real transformations I’ve seen on one hand. Sure, there have been plenty of success stories, but how many of them transformed the way people think, feel, or behave?”

I understand where he’s coming from. Some marketers seem to think, “So many cliches; so little time.” And they sprinkle cliches all over their marketing copy.

“Transform” often fits the bill.

But I also think good products and services can transform. Clients can experience “transformation” from your product and service.

The issue: Most marketers don’t dig deeply enough to understand and describe the transformation their clients experience.

So I posted a reply on LinkedIn. Here’s what I said:

I agree that “transform” is overused. When lobbed without any specificity, it’s meaningless and cliched.

“We’ll transform your organization/process/self” is overused hype.

I think “transform” can be the right word, though, when delivered in the right context with the right specificity.

Example: I met today with an employment coach who helps unhappy workers find a job that better fits their passions and skills.

When they come to her, they’re



scared. They’re frustrated. They’re anxious. They’re unfocused. Their vision is blurry. They’re unsure of themselves.

She works with them, and they ... transform. From scared to courageous. Frustrated to satisfied. Anxious to calm. Unfocused to focused. Blurry to clear. Unsure to confident.

In this case, maybe “transform” IS the right verb.

The problem with “transform” is that marketers toss it around without describing the journey.

“Your organization/process/self will be TRANSFORMED.” Period the end. And we’re left wanting.... Transformed from what to what?

Storytelling is so powerful for marketers because a good story describes a journey.

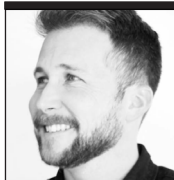
A good story describes a transformation.

“We’ll transform your business” or “we’ll take your business to the next level” is a vague, cliched promise.

But when you tell a story, you paint a picture of transformation — the kind of transformation your prospects wish to experience.

If you can discover the journey your prospects wish to take, you can create a story — a story of transformation — that will inspire prospects to buy. ■

Tom Ruwitch is the CSO (Chief Story Officer) at Story Power Marketing and the author of a free eBook, “Hall of Fame Advertisements Reveal: 5 Storytelling Secrets to Captivate Prospects and Inspire Them to Buy,” ~ available for immediate download at StoryPowerMarketing.com/5secrets.



Your Best Strategy And Inspirational Leadership Are Not Enough

This time of year can be a special kind of hell for people in leadership. In addition to closing out your annual goals, you are trying to take every spare moment to think about next year. Given how unpredictable the past couple of years have been, it is hard to know where to start. Do we assume the pandemic disruptions continue? Do we focus on working from home as part of our inclusive workplace?

Given this level of uncertainty, it is no wonder that this feels like a kind of hell. What was an already difficult task has become yet more difficult.

But here's some news that you may not like: You made this hell.

True, you did not create all the circumstances. You did not set a pandemic in motion. You did not orchestrate the uncertainty. But you made your leadership challenge more difficult with your understanding of strategy and leadership.

There is a way up and out. The only requirement is an openness to acknowledging the shortcomings of strategy and leadership, at least strategy and leadership as they are understood generally. After that, the way out is through a new mindset. One that embraces uncertainty and possibility as the fuel for continued innovation. It is an organizational foresight mindset.

If we are to assume that the Fortune 500 of any particular year represents the most excellent in strategy and leadership, then we can, perhaps, assume that the longevity on the list represents their ability to adapt or innovate. A recent Forbes analyst found that of the companies on the original list in 1955, 88% of them were gone by 2017. Additionally, leading firms are falling off the list at a faster rate.

The same Forbes analyst came to the following conclusion: The companies that sustain on the list have one common feature. They were lucky. There was



some combination of happenstance, curiosity, ambition, and need that created innovations. So how do organizations cultivate the environment in which luck can happen? The organizational foresight mindset.

This mindset is fostered by a continued, intentional set of rituals intended to find the drivers for change for you and your industry. It can start as low impact as a quarterly discovery session with the insightful people on your team in which you look forward together. Ask yourselves: What are the potential forces that could disrupt us? What are new opportunities? How can we talk about what we see in five years? It can start that simple, and you will be surprised at what you find. The point is that you make the beginning. That is leadership.

Developing, at an institutional level, foresight thinking must become a working part of your organization. You must create the discipline to explore possibility. It will seem, at first, to be disconnected from the task-oriented, manager mindset. It is. It is not a break / fix model. You will likely spend all of your leadership capabilities on just getting the buy-in necessary to think this way. But

you must do this. It is worth it.

If you fail to start this now, you are marching in lockstep toward irrelevance. There is no other end. Your organization and its response to the marketplace or culture will become less and less useful with changes to that marketplace or culture.

But the best reason that I challenge you to start intentionally incorporating foresight mindset into your organization is this: It creates a deep sense of meaning. Tapping into imagination and cultivating potential futures is proven to increase motivation, adaptability, and confidence. It is an indirect investment in your people strategy. When people are encouraged to think about what could be, they are more likely to address present-day challenges as opportunities for innovation — even if a majority of those innovations fail.

It is with this mindset that you can face chaos and challenges with serenity. Because you will have learned what disruption feels like, you have trained up that skill in yourself. ■

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What To Know When Selling Your Personal Residence In The 2021 Real Estate Market

The pandemic ignited change in many ways, including a boom in home sales. If you're thinking of taking this step, here are some tax considerations before putting your home on the market.

Gain Exclusion May be Available

You may be able to exclude some of the gain on the sale of your personal residence if you owned the personal residence for fewer than two years if your reason for moving is related to a job change, health issues or other qualifying reasons.

Loss on the Sale of a Personal Residence

Real estate is generally an appreciating asset, but there are times when a home is sold at a loss — even in the current real estate environment. Unfortunately, the loss on the sale of a personal residence is considered a non-deductible loss. The loss cannot be used to offset other gains from other investments.

Taxes May Apply to the Sale of a Personal Residence?

States each have their own approach to the taxation of the gain from the sale of a personal residence. Some states follow the federal gain exclusion amounts; some states have a separate gain exclusion amount as well as different rules to qualify for the gain exclusion; and some states do not have a gain exclusion at all and tax the full gain regardless of how long you owned the personal residence.

Other Considerations

To the extent that you depreciated your home while you lived there as an office for a small business or as a partial rental, there may be a portion of the gain that is recaptured at a rate higher than the long-term capital gain tax rates.

Another consideration that real estate investors can use for the sale of real estate investment property is the Section 1031 like kind exchange. This transaction method allows you to sell a real estate investment property and reinvest in a new real estate investment property without recognizing the gain on the sale of the first property. Unfortunately, the sale of a personal residence does not qualify for Section 1031 treatment as a personal residence is not considered an investment property.

There are many considerations to think through as you plan for the tax impact on the sale of your personal residence. Taking the time to research and understand the most likely outcome for the sale of your home will prepare you to make the optimal decision for your circumstances. You should also consult with your tax advisor about your unique tax situation. ■

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Prior to joining Armanino, Karen was a partner and practice leader for Brown Smith Wallace's Entrepreneurial Services Group.



Pitfalls of Software Implementations

BY SCOTT M. LEWIS

The purchase of new software: It sounds exciting, and you go into it with the hopes that it is going to solve your business-related problems. You could be purchasing it to solve a very specific issue or to create more cohesive processes throughout the company. Regardless, you have identified issues within your business and decided you are going to solve them with software.

I've heard it a thousand times, and I've seen it in action many times: Someone volunteers, or is voluntold, to be the point person, and they pick up the phone and start calling software vendors. The goal is to start interviewing and setting up demonstrations while putting the vendor in the power position of selling their software.

Unfortunately, you are already on a downhill slide with this approach because you have not done the legwork and research to document your business needs and requirements, including putting them down in writing. The needs and features analysis are critical to success; you are going to require it in order to go through the selection process, measure vendors and measure the software in comparison to your business needs to increase the likelihood of selecting the right software for the right reason.

The selection of new software can be the most exciting and impactful process for your organization to go through. It can be enlightening, as you may learn a lot about your actual business operations. As owners, we always think we know how our business operates; however, it has been my experience over 35 years that when you get down to the people who actually do it, that process can change dramatically.

Software implementations can also be very stressful and can bring out many dynamics — both business and human — that will need to be dealt with. We all want software that fixes our issues but allows us to work the way we are accustomed to. However, that is not always the reality, and change can be challenging for organizations.

Positive evaluation and process change are essential to the long-term sustainability of any organization, but this requires you to take a long, hard and honest look at what you are doing and the way you are doing it. The whole purpose of the software is to fix, streamline, improve or change the identified areas within your business. For owners this is always difficult; we all think we are doing things right and we have the

best business in the world. However, there is always room for improvement, and that can involve conflict.

Here are some of the pitfalls you should look out for once you have selected new software:

■ **Fear of change.** Oddly enough, in many cases the fear of change comes from the ownership, usually as buyer's remorse. Remember, we thought we knew how our business ran; now we are having to face the fact that might not be true. The ownership must be fully committed to the process and the new path created by software. I have seen it many times: If the ownership provides a path for people not to work within the software — good or bad — then they have already started down a path of software implementation failure. Stick to your guns, maximize your return on investment and have the fortitude to push aside those who want to stick to the old way. Remember it's the long-term value you are after; stay focused in order to get there.

■ **Benefits of the software being left unexplained.** This really goes back to the first thing you should do when selecting new software, which is to know your business. Do this by being inclusive throughout a cross section of your business. It is critical that you understand specifically how your business operates — the good, bad and ugly. Document those work processes, identify the specific areas of improvement you are focusing on and then prioritize those issues. This leads to picking the right individuals to be on the selection team, and then they can get their team members excited about the change. You have to make it public; don't assume people are just simply going to buy into the new ways and abandon the old. Ensure you convey all of the benefits of the software and how they will assist the workflow.

■ **The naysayers and slackers.** There are always those who are more resistant to change, those who are comfortable with a process, and road blockers who are slow to perform tasks as assigned or to learn the tips and tricks of the new software. These are the team members who are going to need some additional attention and support to learn and adopt the new software and encouragement that doing so is about improving the overall business. To overcome this, it is important that both the ownership and the management are feeding positive information regarding the changes, relaying the need for the changes and their benefits.



■ **Circling back around.** Feedback is key to the overall long-term success of any software implementation. Circling back around internally to make sure the team has not fallen back into old habits is important. This also allows your team to better identify areas of improvement that are needed within the software. The software vendors are always going to be motivated to improve their product, so work with the vendor in order to better enhance the software to meet your specific needs. This also applies to validation of software usage; the human factor dictates that if you don't like the way something is working, you will find a work-around. This is good and bad, and it may be a necessary evil based on the limitations of the software. However, if it is simply that team members don't like the way it works so they are refusing to use it, then they are inhibiting your business from reaching the level of success you intended. This is where ownership must have the fortitude to require team members to use the software for the overall benefit of the company and its mission — easy to say, tough to do.

There are lots of reasons why software implementations fail. Sometimes it is hard to not blame the software; however, I will concede that some software just simply falls short of the expectations regardless of how well you have worked the process and made your selection. If you do your homework on your business, document your work processes and work flow, and clearly

identify why you need new software and what features you require, you are far less likely to select bad software. You still have to consider training as a key factor — not just the initial implementation training but also ongoing training for all employees.

I always coach our customers that it is worthy of their time to focus on their business first and to know why they want to buy software before even talking to a software vendor. Don't fall in love with the first thing you see or the pretty salesperson, be open-minded and remember the big picture, but understand that you are not going to make everyone happy. Software can drive a business to incredible heights, but the impact of a bad selection can be felt for years. ■

Scott Lewis is the president and CEO of Winning Technologies Group of Companies, which includes Liberty One Software. Scott has more than 30 years of experience in the technology industry and is a nationally recognized speaker and author. He has worked with businesses to empower them to use technology to improve work processes, increase productivity and reduce costs. Winning Technologies' goal is to work with companies on the selection, implementation, management and support of technology resources. Learn more about Winning Technologies at www.winningtech.com or by calling 877-379-8279.



The Cookie Is Crumbling: How Marketers Can Adapt

For years, it has been a delicious resource for many marketers seeking to gain insights into the actions and behaviors of website visitors. “Cookies,” which are small text files with ID tags that interact with a web visitor’s browser to keep track of movements within the site, identify preferences and provide information that can be used to formulate observations about online customers and prospects.

These cookies however, are beginning to crumble. Web browsers like Firefox and Safari have already eliminated them from their interfaces and digital industry giant Google has announced that it will ban third-party cookies in 2023. While the reasons for eliminating this online tracking are typically privacy related (online users are demanding greater transparency and control over how and where their data is being used), it’s clear that cookies, as we currently know them, are toast. Wait . . . well you get the idea.

So as a marketer, how are you preparing for a cookieless website environment? While some see this situation as a roadblock to customer insights, others see it as an opportunity for new thinking and approaches. Google for instance already has been sharing its ideas for a “Privacy Sandbox,” a revised cookie-like strategy that allows company websites to track web visitors and direct appropriate pop up ads to them, but in a secure environment that also greatly increases user privacy.

Some marketers and advertisers point to this as yet another attempt by Google to strong-arm and control the path to digital customer insights and sales, but there are also other interesting options to consider. Take for instance contextual advertising that allows you to circulate pay-per-click (PPC) ads on websites that rank for similar keywords as your services



(i.e., your auto service ads are triggered to appear on automotive enthusiast websites via keywords).

A growing number of marketers and advertisers are also opening their eyes to the unique relationship between online and brand advertising. While one is trackable and one isn’t, there’s a growing sentiment that when they are strategically combined, great things happen – like increased sales that can’t necessarily be tracked to a specific buyer action or behavior (but ultimately, aren’t sales the ultimate measure of success?).

If you’re still one of the website owners mourning the loss of cookies, here’s my advice: be aware, be patient, be adaptable. News about this issue is coming out

seemingly weekly. Stay up to date with the latest technology reports and opinions. Continue to explore tried and true cookieless approaches (and new ones, too). And remember, there’s rarely only one path that leads you to a successful destination. You’ll be fine. We all will.

It’s a lot to think about. But there’s a lot to be gained. As a marketer, understanding the customer buyer journey is important and can be inspiring. Ultimately, it’s a great way to set your course for success. ■

David Meyer is the Chief Marketing Officer at Spoke Marketing. Spoke Marketing (www.spokemarketing.com) provides fully-integrated marketing and sales programs that define and activate the customer buyer journey.

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Best in Value

Everyone wants to get the most out of their money. The following were voted the businesses with the best value in St. Louis. Make sure you check out the Awards page at www.sbmon.com to stay up to date with other Best in Business nominations for 2021.

COMPANY NAME	CONTACT INFORMATION		
Breneman and Company, PC	314.469.7007 brenemancpa.com	•	14382 Woodlake Dr. Chesterfield, MO 63017
Byrne Software Technologies	636.537.2505 byrnesoftware.com	•	16091 Swingley Ridge Rd., #200 Chesterfield, MO 63017
Clemmer & Associates	636.946.1523 clemmerandassociates.com	•	2850 W. Clay St., #225 St. Charles, MO 63301
Computer St. Louis	314.394.5000 computerstlouis.com	•	10011 Watson Rd. St. Louis, MO 63126
Evans & Dixon, LLC	314.621.7755 evans-dixon.com	•	211 North Broadway, #2500 St. Louis, MO 63102
First Missouri Credit Union	314.544.5050 1stmocu.org	•	1690 Lemay Ferry Rd. St. Louis, MO 63125
Engage	314.966.4000 engagesoftware.com	•	11780 Manchester Rd., #207 Maryland Heights, MO 63131
J&B Technologies, Ltd.	314.993.5528 jbtech.com	•	180 Weldon Pkwy. Maryland Heights, MO 63043
Klar, Izsak & Stenger	314.863.1117 lawsaintlouis.com	•	1505 S. Big Bend Blvd. St. Louis, MO 63117
Mathis, Marifian & Richter, Ltd.	314.421.2325 mmritd.com	•	230 S. Bemiston Ave., #730 St. Louis, MO 63105
MBI Worldwide	866.275.4624 mbiworldwide.com	•	101 N. Park Ave., #200 Herrin, IL 62948
Midland States Bank	636.464.7733 midlandsb.com	•	1920 Richardson Rd. Arnold, MO 63010
Orlando's Catering	314.638.6660 orlandogardens.com	•	4300 Hoffmeister Ave. St. Louis, MO 63125
QFA Pros LLC	636.265.2933 qfapros.com	•	1000 Edgewater Point, #301 Lake St. Louis, MO 63367
Reeg Lawyers	314.574.2287 reeglawfirm.com	•	939 N. Clay Ave. St. Louis, MO 63122
Reizman Berger	314.727.0101 reizmanberger.com	•	7700 Bonhomme Ave. St. Louis, MO 63105
Rise Marketing Solutions	618.600.2156 risemarketingsolutions.net	•	6581 Miller Dr. Edwardsville, IL 62025
Sano & Company, P.C.	636.530.0272 bettysanocpa.com	•	165 Chesterfield Business Pkwy. Chesterfield, MO 63005
Simpjoy, Inc.	314.544.1700 simpjoyonline.com	•	13023 Tesson Ferry Rd., #105 St. Louis, MO 63128
Solex Technology Group	314.781.6700 solextech.com	•	2460 Executive Dr., #117 St. Charles, MO 63303
Summer Compton Wells	314.991.4999 summerscomptonwells.com	•	8909 Ladue Rd. St. Louis, MO 63124
Swink, Smith, Coplen & Co., P.C.	314.842.2001 swinkcpas.com	•	3880 Lindbergh Blvd. St. Louis, MO 63127
Vantage Credit Union	314.298.0055 vcu.com	•	4020 Fee Fee Rd. Bridgeton, MO 63044
Welch Law Firm	636.352.1222 welchlawllc.com	•	50 Centre on the Lake, #200 Lake St. Louis, MO 63367



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Best Accountants

Stay on top of your finances with help from one of St. Louis' top accountants. The following accountants were voted the best in St. Louis. Make sure you check out the **Awards** page at www.sbmon.com to stay up to date with other **Best in Business** nominations for 2021.

COMPANY NAME	CONTACT INFORMATION	
Dan Anton, Wilhelm & Wilhelm, LLC	314.727.1155 wilhelmcpastl.com	• 7777 Bonhomme Ave., Unit 2001 St. Louis, MO 63105
Rob Berger, Anders	314.655.5500 anderscpa.com	• 800 Market St., #500 St. Louis, MO 63101
Renee Bockerstett, Botz Deal & Company, CPAs	636.946.2800 botzdeal.com	• 2 Westbury Dr. St. Charles, MO 63301
Ray Brune, BWTP	314.576.1350 bwtpcpa.com	• 424 S. Woods Mill Rd., #340 Chesterfield, MO 63017
Darlene Davis, Davis Associates, CPAs	314.653.0008 davisassociatescpa.com	• 4119 US-67 Florissant, MO 63034
Tom Dunn, Tom Dunn CPA Firm	314.500.1200 tomdunncpa.com	• 677 Craig Rd. Creve Coeur, MO 63141
John Dunham, Schowalter & Jabouri, PC	314.849.4999 sjcpa.com	• 11878 Gravois Rd. St. Louis, MO 63127
Tyson Eagen, The Triton Group, CPAs	877.552.9224 tritoncpa.com	• 16236 Westwoods Business Park Ellisville, MO 63021
Allan Epstein, Lopata, Flegel & Company	314.514.8881 lopataflegel.com	• 600 Mason Ridge Center Dr. St. Louis, MO 63141
Kevin Fine, Fine and Associates	636.532.9100 finecpas.com	• 701 Crown Industrial Ct. #T Chesterfield, MO 63005
Dennis Fry, CPAs For Hire, LLC	314.985.8110 cpasforhire.com	• 13492 Clayton Rd. St. Louis, MO 63131
Laurie Griffith, Lopata, Flegel & Company	314.514.8881 lfco-cpa.com	• 600 Mason Ridge Center Dr. St. Louis, MO 63141
Mark Hoffman, Hoffman Clark	314.863.8777 hoffmanclark.com	• 8000 Maryland Ave., #820 Clayton, Mo 63105
Laura Isaac, Elder and Isaac, CPA, PC	314.727.4300 elder-assoc-cpa.com	• 8151 Clayton Rd., #204 St. Louis, MO 63117
John Kasperek, Kasperek Accounting & Co.	636.256.7000 kasperekaccountants.com	• 14563 Manchester Rd. Ballwin, MO 63011
Doug Mueller, Wipfli	314.862.2070 wipfli.com	• 7733 Forsyth Blvd., #1200 St. Louis, MO 63105
Angela O'Sadnick, Bauers, Hawkins, O'Sadnick & Co.	636.928.5412 bhc-cpa.com	• 4600 Executive Centre Parkway, #A St. Peters, MO 63376
Brian Ostendorf, Conner Ash	314.205.2510 connerash.com	• 12101 Woodcrest Exec. Dr., #300 St. Louis, MO 63141
Dan Schindler, Anders	314.655.5500 anderscpa.com	• 800 Market St., #500 St. Louis, MO 63101
Jim Schmersahl, Schmersahl Treloar & Co.	314.966.2727 stcpa.com	• 10805 Sunset Office Dr., #400 St. Louis, MO 63127
Keith Slusser, Fick, Eggemeyer & Williamson, CPA's	314.845.7999 afewcpas.com	• 6240 S. Lindbergh Blvd., #101 St. Louis, MO 63123
Ashley Smith, Swink, Coplen & Co.	314.842.2001 swinkcpas.com	• 3890 S. Lindbergh Blvd. St. Louis, MO 63127
Larry Staab, Hutson Gobble LLC	314.968.5341 hgllc.cpa	• 20 Allen Ave., #341 Webster Groves, MO 63119
Karen Stern, Armanino	314.983.1200 bswllc.com	• 6 CityPlace Dr., #900 St. Louis, MO 63141
Jayson Thornton, Thornton Advisor Group, LLC	314.776.9076 thorntonadvisor.com	• 319 N. 4th St., #608 St. Louis, MO 63102
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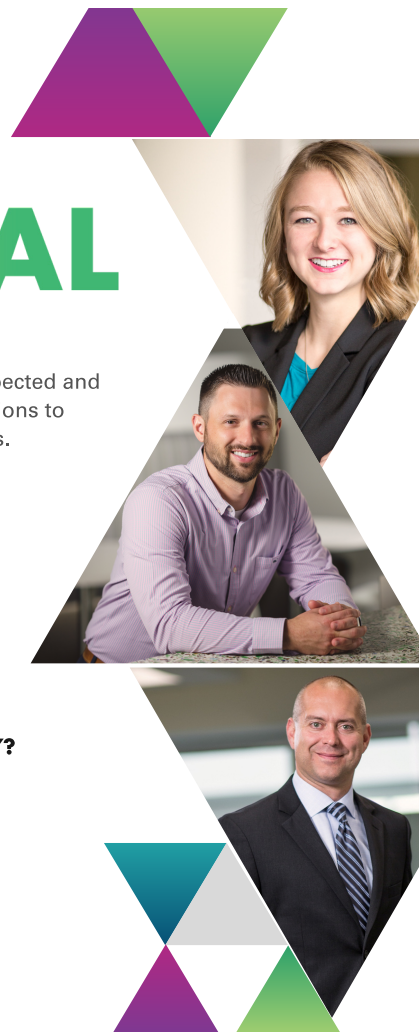
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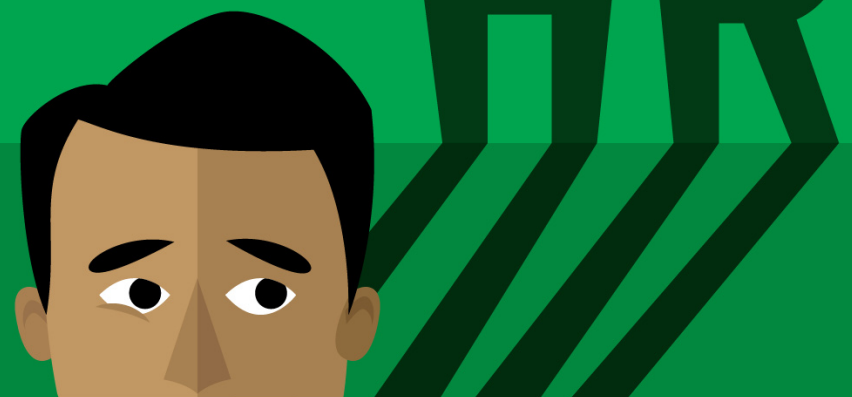
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Leveraging Talent in the YOLO Economy



In a trend called the “YOLO Economy,” highly skilled twenty- and thirty-somethings are leaving their jobs or seeking flexible work models that give them better work-life integration. If employers are willing to “flex,” they can attract this in-demand talent pool. Workplace trends expert Rick Grimaldi shares some powerful insights.

Written by **Rick Grimaldi**

FEATURE STORY

The pandemic changed everything overnight, including the way skilled millennials want to work. After a year and a half of COVID anxiety and burnout, they are turning away from traditional, well-paying jobs in pursuit of passion projects, and they are pivoting to careers that let them live happier, more fulfilling lives now. And this situation poses a challenge for employers: How can you attract this talented pool of workers?

Competing for these workers is about creating a personalized approach to work, but it has to make sense for both employers and employees. If you can hammer out the details up front, the relationship can work beautifully. But if you jump in without laying out expectations first, it can be endlessly frustrating for you and other employees.

The workplace has always been an arena of change and flux. But in the COVID era, it's more important than ever to respond to disruptions and be willing to "flex." If you stay nimble and ready to adapt, you can attract the best talent, including currently disillusioned YOLO workers. A few tips:

Consider the downsides of having a team of remote workers. For example, remote employees miss out on having a better connection with others, better collaboration, accelerated learning, cross training, mentorship, and more. All these factors should figure into your decision as you assess the pros and cons of offering more flexible arrangements.

Know where you can really flex and where you cannot. Some jobs can easily be performed remotely while others require an employee to be on-site. Ask yourself, "What makes sense for the job?" No matter how great a candidate seems, if they're insistent on working virtually for a job that really needs to be on-site, you will do neither yourself nor the employee any favors by hiring them. And you won't be setting them up for success.

Know what "right" looks like for the job. What metrics should the employee be able to meet? Do they have the skills needed to do the job well? Know what you are looking for ahead of time. Very often, high performers in the office are high performers in a virtual setting as well, and vice versa.

When negotiating, be very clear about the job requirements. Do you need a 9-to-5 requirement from your employees? Do they really need to work in the office?

Must they live in the same city to do the job? How much "face time" is really required in your business? Candidly share your must-have requirements up front, but also listen carefully to their needs as well.

If they don't want to work in the office, dig deeper to better understand their needs. Until you ask, you cannot be sure of their reasoning and needs. Is the issue a long commute in heavy traffic? Or is it something else that you might be able to address? You may be able to find a solution that works for everyone. Just make sure you don't inquire about topics that could create a perception of discrimination.

Keep their personal goals in mind. Millennials and Gen Z employees are seeking work-life integration, and they are very open about it. They may want the flexibility of working for you while also having time to pursue other goals, such as running a side business, being more present for their family, or having time to travel. A hybrid or flexible work model may allow you to help achieve everyone's goals in tandem.

You might discover that you need employees to start on-site during regular work hours, but they can later ease into a virtual or more flexible arrangement. Make that requirement clear up front. But if you're unsure this arrangement will work, be clear about that, too. Be very careful not to mislead.

Be sensitive to your workers' emotional wellbeing. The stress and trauma of COVID-19 has brought awareness to the issue of mental health. If possible, offer wellness and assistance programs. Design benefits, career tracks, and work arrangements with an eye toward meeting the needs of employees at different stages of life. Finally, destigmatize mental health issues so employees know it's okay to ask for help.

A little compromise goes a long way. If you communicate and stay flexible, you can find solutions that fulfill everyone's needs. In the long run, it's worth the extra effort because you will gain talent that gives you a competitive edge, and your workforce will remain loyal because you work with them to achieve their career and life goals. ■

Rick Grimaldi is a workplace trends expert and the author of *FLEX: A Leader's Guide to Staying Nimble and Mastering Transformative Change in the American Workplace*.

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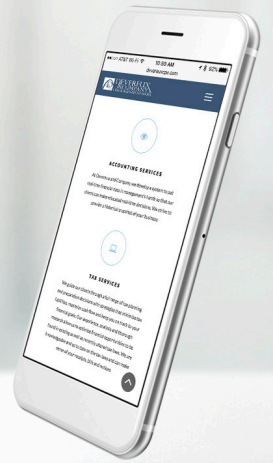
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St. Louis' Top Veterans

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WORDS RON AMELN
PHOTOS BILL SAWALICH



This month, we are proud to present some of the Top Veterans in the Workplace. These veterans not only served their country with pride and dedication, they are now serving local businesses. Their experiences and talents are helping build some of the region's fastest-growing firms.

These are not your average Vets, they are the best in the region.

Randy Micheletti | Geile/Leon Marketing Communications

Title: Vice President, Director of Brand Strategy
Industry: Marketing/Advertising
www.geileon.com

What was your branch of service?
United States Navy

What skills/experiences in your service career have helped you become a better employee at your company?
Extreme attention to detail in everything I do. A focus on flawless execution. Organization and timeliness in any assignment. Team play — it's more about the "We" than the "Me." Confidence, leadership and motivation. Great oral and written communication skills. Integrity. The ability to adapt and perform extremely well under pressure. Elite problem-solving skills

What advice would you give to service members just starting their civilian careers?
Approach your civilian career with the same tenacity and dedication as your military career. Continue to be a great leader, but always listen to others' opinions. Focus on continuing to develop written and oral skills. Lead by example — it still works.

What led you to your industry?
The passion to solve problems for my clients and to assist them in reaching any objective. Developing a strategy to help them build their brands across all markets, channels and audiences.

Who is your role model and what have you learned from him or her?
My role model in this industry is my mentor, Tim Leon. He's taught me several things. You can be an honest, hard-working person in the advertising industry and be successful. Nice guys don't always finish last. Work hard and play hard and understand that work/life balance is a necessity. Hire smart, multi-talented people with a passion to do great work. He also showed me how to build an agency that believes in developing a culture like no other. ■



In The Workplace

Jim Burgess | Purk & Associates, PC

Title: Financial Advisor

Industry: Wealth Management

www.purkadvisors.com

What was your branch of service? Army

What skills/experiences in your service career have helped you become a better employee at your company?

My experience in the military has taught me the value of a trusted team. Individuals do not succeed, teams do. To succeed in the Army, you first must learn to follow, then to be a good teammate and then to lead. This philosophy applies 100% to the ever-evolving disciplines of wealth management.

What advice would you give to service members just starting their civilian careers?

Manners matter. Customs and courtesies are far more protracted for civilians than military members. Slow down and smile, or your efficiency may be mistaken for a far more negative attribute.

What led you to your industry?

A desire to continue to be part of a team that can provide a long-term impact to better our clients' lives. I strongly believe that, next to health, financial concerns are the greatest stressor of most Americans. The ability to alleviate the stress of financial uncertainty provides us the opportunity to make a huge difference in our clients' quality of life and provides meaning to our work.

Who is your role model and what have you learned from him or her?

One of the founders of our firm, Bill Purk, has been my personal mentor for more than a dozen years. He has taught me by example that when we keep our focus on the welfare of our existing clients, business thrives.

What's the best part of your job?

Showing clients that they are going to be ok.

What has made you successful in your industry?

A passion for exceptional customer service. ■



VETERANS IN THE WORKPLACE

John Weiss | TAG, Inc.

Title: CEO
Industry: Healthcare
www.theauditgroup.com

What was your branch of service?
United States Marine Corps [the real military]

What skills/experiences in your service career have helped you become a better employee at your company?

Critical thinking and acting skills. I was an 18-year-old, white kid from white West County, and I was placed in an environment where I had to co-exist with people from all walks of life and all socio-economic and educational levels from around the world. I grew up fast. I was given responsibilities I would never have been given if I was a civilian. I had senior officers asking my opinion on topics I was trained to know. I learned about life and my confidence exploded. I learned I could handle anything life threw at me. This never would have happened had I gone straight from high school to college.

What advice would you give to service members just starting their civilian careers?
Use your life lessons in the service to your fullest benefit as a civilian. These lessons are unique and special, and very few others have had the honor to experience them. You are a teacher.

What led you to your industry?
That's another story for another time.

Who is your role model and what have you learned from him or her?
My role models were my mother and my gunnery sergeant, James Jasinski. They both taught and reinforced in me the necessity for living a life with honor and integrity, and not to accept any bull crap — kind of important, in my opinion.

What's the best part of your job?
Working with intelligent, motivated and interested people helping our clients be better.

What has made you successful in your industry?
God, Country and the numerous people who devoted their time and efforts trying to teach me the best of what they know (many repeatedly).■



Dave Geile | Geile/Leon Marketing Communications

Title: Creative Director and CEO
Industry: Marketing and Communications
www.geileon.com

What was your branch of service?
United States Army

What skills/experiences in your service career have helped you become a better employee at your company?
Military service gives you discipline, focus, confidence and resolve. It trains you not only to take orders, but also gives you the ability to lead if needed.

What advice would you give to service members just starting their civilian careers?
Use your military experience and run with it. You are now one of a small minority of Americans who have put their lives on hold to serve their country. Be proud of that service. Humbly proud.

What led you to your industry?
Do you remember that one kid in your grade-school class who everyone knew could draw? That was me. I would win community poster contests in grade school. I won a camera one year and a savings bond another. After my military service, I went to art school and studied graphic design, along with communications and journalism. I became an art director at a large advertising agency and ultimately started my own agency.


Who is your role model and what have you learned from him or her?
It's funny ... because this is true. I modeled myself after people I didn't think were good role models. Bad bosses, terrible managers, bad clients, unpleasant co-workers: I would always tell myself, "Don't be that" or "don't treat people like that." So, that role model thing worked a little in reverse for me. If I had to give you a name, I would say Steve Jobs. I admire what he accomplished, but I understand he was harsh and difficult to work with. So again, "Don't be that."

What has made you successful in your industry?
I love what I do. I could never imagine myself working in some other industry. I have been a guest speaker at many colleges, high schools and even grade schools. I always tell my audiences to find something they love — something they are passionate about — and they will never work again.■





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The A-Players

Finding the right people to help you move your business forward is a big challenge. Learn the motivations and traits of St. Louis' most remarkable employees.

PHOTO BILL SAWALICH

Leslie Gregory | Fick, Eggemeyer & Williamson, CPAs

Position: Audit Manager

What was your first job?
Waitress at Steak n' Shake

What was your worst job?
The only job I did not enjoy was working retail at the local mall.

What led you to your industry?
I went to college thinking I would major in marketing. During my sophomore year, I took Intro to Accounting as one of the required courses. I fell in love and officially switched my major at the beginning of my junior year. During my senior year, I reached out to various accounting firms in the Columbia, Missouri, area. A local CPA firm offered me an internship to prepare and assemble tax returns, which I eagerly accepted. The same firm offered me a job after I completed school, and I was immediately thrown into the world of auditing.

What was the smartest thing your company did in the past year?
The smartest thing my company did in the past year was to understand the value that employees contribute to the overall success of the firm. They have found ways to recognize staff for going above and beyond their normal duties. When verbal recognition is not enough, the company has been known to take the staff out for a long lunch, play a

few rounds at Top Golf, get a manicure and pedicure, take the afternoon off, etc. Other times the staff is monetarily compensated through bonuses, generous raises, or additional vacation days.

Who is your role model and what have you learned from him/her?
My father is the hardest working person I know. He always gives 100% to his career, friends and family. He instilled in me to give my all to everything I do, especially when others are counting on me. He taught me the value of a dollar and an appreciation of everything I have, as well as many other values. People constantly remind me of how selfless my dad is, which makes me proud to be his daughter. One day, I hope to be as great as he is as a person.

What's the best part of your job?
The best part of my job is that no two days are the same. I love that one day I am running a payroll and the next day I am auditing a city. I also love that I can teach others how to be better at their jobs and that I am continuously learning and growing to be a better accountant and leader.

What is your favorite part of St. Louis?
My favorite part of St. Louis is that there are so many amenities to explore and food to try. I also love the opportunity to watch the Blue's play in person.



Scott Gabel | SFW Partners LLC**Position:** CPA, Principal**What was your first job?**

My first and only full-time job has been with SFW Partners, LLC. I was hired right out of college and have been with SFW Partners ever since. I had a part-time job working for Quiktrip through high school and college.

What was your worst job?

I really have not had a bad job. I have only worked for a few companies and really have enjoyed working for them.

What led you to your industry?

My high school had a few accounting classes. I was always good with numbers so I signed up for them. I especially liked one of the classes and had a good teacher who took the time to explain accounting to me. From then on, I enjoyed analyzing the numbers and how they impact businesses.

What was the smartest thing your company did in the past year?

I think my company did a great job being flexible and pulling together to help our clients as much as we could during the pandemic.

Who is your role model and what have you learned from him/her?

My parents are my role models. They worked extremely hard and selflessly their entire lives. They built the foundation in me that makes the purpose and values of SFW Partners align with mine: to serve and support people, achieving more together.

What's the best part of your job?

The people. The relationships I have built with my clients and colleagues make it more than just a job. I get to work with some of the best businesses and people in St. Louis.

What is your favorite part of St. Louis?

I love that St. Louis is a small "big city" where you run into people you know everywhere. I also love the St. Louis Blues, St. Louis BBQ and St. Louis Beer.

**Rebekah Tucker | Anders CPAs + Advisors****Position:** Manager + Tax, Anders CPAs + Advisors**What was your first job?**

Aside from working at the customer service desk at Kohls, my first professional job was a tax internship at Anders. I have stayed with the company ever since, making my way to a promotion as manager this summer.

What was your worst job?

I have been blessed to have had no horrible jobs. I've only had a few jobs, and I had great coworkers and learned a lot from each position.

What led you to your industry?

I enjoy math and client service. Helping people by doing what I love is the best kind of career.

What was the smartest thing your company did in the past year?

Anders went to extra lengths to maintain, support and grow the company's employees. While other CPA firms (and other industries) needed to reduce staffs during the pandemic, Anders did not hesitate to continue with internships, offer raises and promotions, hire new employees, and give out generous bonuses. The partners and management at Anders genuinely care about their employees, and I could not ask for a better firm to work for, especially during a pandemic.

Who is your role model and what have you learned from him/her?

I have many role models here at Anders. I am given the opportunity to work with and for a variety of individuals with different strengths and approaches to problem-solving. Having so many outstanding role models gives me the opportunity to become the best professional and well-rounded individual that I can be.

What's the best part of your job?

My favorite part of this career is the people with whom I get to work. I work for an incredible team of partners, my



colleagues have become some of my best friends, I get to teach and encourage younger staff, and I get to help and advise great clients. I love being part of an effective and efficient team that supports and promotes individuals and businesses in the area.

What is your favorite part of St. Louis?

I love to see St. Louis's incomparable support for the Cardinals and Blues. We have such an amazing fan base, and given that I work in our downtown office, I thoroughly enjoy seeing all the activity on game days.

Lia Allberg | National Medical Billing Services

Position: Senior Manager, Coder Development

What was your first job?

My first job was as a receptionist for a small orthopedic office. I had just graduated from college, and I was 19 years old. It was a huge eye opener and helped me fall in love with the medical field.



What was your worst job?

I worked at a call center and conducted phone surveys. I was that person who calls you and wants to ask you tons of questions about a certain product. It was very interesting, that's for sure.

What led you to your industry?

I'll never forget this. I was 17, sitting with my dad and trying to decide on college and what I wanted to do for the rest of my life. He suggested the medical field. He told me it's just getting bigger and bigger. I never thought about it until then, and I'm so glad I took his advice.

What was the smartest thing your company did in the past year?

My company was at the forefront of getting involved with the Hospitals Without Walls program through Medicare. Doing so ensured that our client centers could continue to operate during the pandemic and that our patients were able to get the care they needed.

Who is your role model and what have you learned from him/her?

My fellow coders. It's such a family environment, and we're all there to help one another. We often have conversations about coding scenarios, guidelines, updates, etc. I've learned so much from all these wonderful colleagues and have become a much better coder because of them.

What's the best part of your job?

The best part about my job is getting to train new coders and help them achieve their goals in the company. I like knowing that I helped someone and gave them the tools they need to perform their job well.

What is your favorite part of St. Louis?

How friendly everyone is.

Chassie Smith | Simply, Inc.

Position: Director of Operations at Simply Inc.

What was your first job?

My first job was at Pineview Bowling Alley in my hometown of Preston County, West Virginia. I was often there supporting my dad and stepmom on their league nights, and it was the only place in my hometown that people would gather. Since I was there all the time, the owners approached me to see if I wanted a job. For me the opportunity was a win-win: I got paid, got the chance to see my friends and got to keep up with my schoolwork when things were slow.

What was your worst job?

I would have to say Frontend Supervisor at Super Kmart. Retail is a tough industry. I dislike being required to persuade someone to purchase an extra warranty or a rewards program. I have always been someone who looks out for others and ensures they are not being taken advantage of. I also believe holidays are best spent with loved ones, and I preferred to go in a career direction that would allow me to be home during the holidays.

What led you to your industry?

When my first daughter was born, I was an in-home site manager of a community living program for adults with mental disabilities. The position required me to be on call 24/7. After my maternity leave, I returned to work, only to find myself working 40 hours within a few days due to our being short staffed. I went to my supervisor with the intent of stepping down from my management position so that I would not have the on-call functions. I missed my baby girl too much. At the end of that meeting, I was offered a higher-level position in the office with no on-call functions, and I took over the payroll, HR and accounting duties for the entire division.

What was the smartest thing your company did in the past year?

For internal employees, we adapted in the wake of the unprecedented situation we faced with the COVID-19 pandemic. We offered flexibility and remote work as an option to assist our employees while ensuring that the work we do continues. We also adapted to the new laws and regulations that impacted employers to ensure new policies were created, rolled out and understood. This



was a time that our clients and employee needed us the most. Our team does what we do and came together as a unified team to face the challenge.

Who is your role model and what have you learned from him/her?

My dad has always been that person I have looked up to and went to for guidance when I need it. My mother passed away when I was six years old, and my dad has always been there for me. I can't say my childhood was perfect, but I saw my dad push forward every day, always being considerate of others and often putting others' needs before his own. The biggest life lesson I learned from my dad is you get what you give. Nothing in life comes without hard work and dedication, and most importantly always giving more than you take.

What's the best part of your job?

Knowing that I get to help others every day. I get the chance to help small-business owners focus more on their companies and less on human resources and compliance. Most small business owners did not go into business to learn about labor laws. My clients get to spend more time on their dreams, knowing that Simply is there to keep them compliant. I also really enjoy talking with employees and helping them understand their benefits and employment rights.

Sue Hinds | National Medical Billing Services

Position: Coder

What was your first job?

The first job I had was working at an answering service that serviced hundreds of accounts, several of which were cable companies. It was great fun when there were cable outages!



What was your worst job?

I would tell you none of them were bad. However, if I had to pick one, I would have to say being a restaurant server. I have a lot of respect for anyone in that profession.

What led you to your industry?

I started in the health insurance business as an administrative secretary. I saw that the healthcare industry was forever growing, and it seemed like there were a variety of professions from which to choose. I wanted to be working in a field that I knew would be here long term.

What was the smartest thing your company did in the past year?

Our company was so awesome during the pandemic. They were really on top of setting everyone up with computers quickly so that they could work from home. Their top concern was for the safety of employees.

Who is your role model and what have you learned from him/her?

My role model is my colleague, Tamara Wagner, SVP, Performance Review. I have learned so much from her over the years. She is extremely smart and conscientious, and she has such an awesome work ethic. She has strengthened my abilities as a coder and is always continuing to educate me. She inspires me daily.

What's the best part of your job?

The best part of my job is that I am learning something new every day and that I continually feel supported by my employer.

What is your favorite part of St. Louis?

What I love about St. Louis is that it is so diverse and has so much to offer. If I had to pick a favorite part, I would say riding on the Katy Trail and the great wineries.

Robert Schlueter | Archford

Position: Director of Relationship Management and Wealth Management Advisor

What was your first job?

My first job was delivering newspapers door to door to about 60 customers in multiple neighborhoods throughout Belleville.

What was your worst job?

I can't really say I ever had a bad job. Each job taught me valuable lessons I was able to carry throughout my career.

What led you to your industry?

I have always been a numbers guy. I also have always enjoyed helping people and working in a team setting, so the financial services industry seemed like a perfect fit for me.

What was the smartest thing your company did in the past year?

The smartest thing Archford did this year was to constantly adjust and pivot to the changing needs of our customers and employees during the pandemic. We embraced our employees working from home, and I believe we did so without missing a beat in taking care of our customers.

Who is your role model and what have you learned from him/her?

My parents were definitely my role models. They were two of the hardest working people I have ever met. As hard as they worked, they always seemed to love what they did for a living. Putting those two traits together makes for a successful career and life.

What's the best part of your job?

The satisfaction of walking side by side with customers as they go through all of life's events and changes. The financial industry is so much more than just numbers. It is about helping people get from one chapter to the next and working together to achieve their short-term and long-term goals.

What is your favorite part of St. Louis?

There are so many things to do in St. Louis. Whether it's a Cardinals or Blues game, museums, or the diverse restaurant choices, it truly makes for a great place to live.



Jay Sayers | Skeleton Key

Position: Lead Developer, Team Manager

What was your first job?

My first W2 job was a store clerk at a 7-Eleven for the summer between my senior year of high school and freshman year of college. I ran the counter, swapped out the brewed coffee and hot dogs, cleaned the floors and swept the parking lot, stocked items, and locked the cooler at 2:00 AM. The experience forced me to multi-task and prioritize.

I knew I was successful at my job when my boss offered to pay for my college if I continued to work and went to San Diego State University instead of going out of town. I declined.

What was your worst job?

I tried to sell cars for about four months just after college. In my orientation, they handed out a slip of paper containing insurance company information to use if involved in accident. I was told, "No one has ever had to use this."

One Friday afternoon while driving a tricked-out Nissan Frontier that my customer was "...definitely going to buy...and take it on a camping trip this weekend," I went through an intersection where I had the right-of-way and a car slammed into the truck.

All the salesmen, lining both sides of the driveway stood clapping as I returned the crippled vehicle to the dealership.

What led you to your industry?

My path to the software development industry was not quick nor direct. I earned my degree in Music Performance and had been given a computer as my college graduation gift. That's when a friend of mine introduced me to FileMaker Pro with which I built a small database to catalog my music CD collection.

I kept getting jobs that emphasized computer use, data management and technical troubleshooting. While contemplating what to do next, I told my wife, "Tina, if I could make a living making FileMaker Pro databases, that would be ideal." Days later I was offered a job as a FileMaker Pro Junior Developer.

What was the smartest thing your company did in the past year?

Our Leadership Team created an official jobs and roles document.

For each job title, the document details the objective and subjective skills, experience required and salary range. For each role, the document specifies a list of responsibilities and the minimum eligibility and qualifications.

Overall, this document streamlines conversations with our current staff in their review and in discussions about their career path. Potential new hires appreciate knowing what is possible and expected of them if they join our family at Skeleton Key.



Who is your role model and what have you learned from him/her?

Greg Lane, our VP of Development, is the person I try to emulate for many reasons. He sets a high bar in leadership, mentorship, and technical abilities. His patience and ability to listen intently to others is enviable. He is slow to judge and delivers thoughtful decisions.

Greg is smart and resourceful when assisting our customers and our staff. He enables them to intelligently evaluate options by presenting multiple solutions, supporting data, and by explaining options at a level they can understand.

When I consider how to handle a difficult conversation or a technical problem, I find myself asking "what would Greg do?"

What's the best part of your job?

The part of my job that I enjoy the most is having the

chance to assist others while building relationships.

First, I have the pleasure of working with our customers to come up with solutions to their business needs. It involves a process of learning about their business, their staff, and the person with which I work directly. Problem-solving with them can be a thrill. It is just as much about the journey as it is the final product.

Secondly, I have the honor of onboarding and training our new staff developers, and I manage a team of awesome people.

What is your favorite part of St. Louis?

My favorite part(s) of St. Louis are the natural surroundings and the culture.

The trees and hilly landscape are incredibly beautiful and calming. The lakes, the flowing creeks, and rivers fill the void of not living near the ocean anymore.

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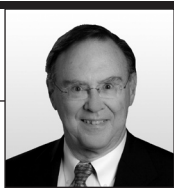


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Essential Points To Follow When Entering Into Or Renewing Your Lease

In spite of the uncertainties caused by the pandemic, your lease remains critical to your business. Commercial leases are complex transactions and should be undertaken with great care. Following these basic points will make the lease renewal or new lease go smoothly.

1. Know your dates. I have seen many cases where tenants allow their lease renewal deadline to pass or, even worse, have their lease automatically renewed by failing to follow these important deadlines. You should check your lease to see exactly what options you have for renewal as well as the deadline specified in the lease to notify the landlord of your intention to renew. These deadlines are usually strictly enforced by the courts. Likewise for new leases, you need to know when you can occupy the premises – i.e., the start and end dates of the lease term.

2. Start early. You should start your decision process well before you need to enter into or renew your lease. The earlier you start, the more time you will have to test the market, review potential alternative sites and make your decision. Many renewal provisions have a market rent adjustment, so you will need to find out what your landlord proposes as “market rent” well in advance of the deadline to give you time to negotiate or consider alternatives.

3. Consult the experts. You should consult a commercial real estate broker familiar with your type of property and location to assist you in determining the options available in the market, including rent and other terms that landlords are providing. These professionals know the market, players and concessions generally available. Brokers generally work on a commission basis (typically the landlord

pays the commission), and your landlord will most likely be consulting with his or her broker, so you need to even the playing field. At the same time, you should consult with a real estate attorney so that your attorney will be on board when the lease proposal is made and when you are presented with a lease or renewal document.

4. Carefully review the lease documents. Depending on the type of property, whether construction is contemplated and many other factors, leases are lengthy and complex. Much legalese is involved, and legal terms have meaning and importance that are not apparent to someone who is inexperienced in reviewing and negotiating leases. The lease or renewal document should be carefully reviewed by your attorney and revised to include provisions necessary to protect your interests. For example, a “Force Majeure” provision should be included for relief from government shut-down orders, etc. You should also request a renewal option with a fixed rent so you can extend your term at your option. These are just a few examples of terms that are critical to your protection. Most landlords have lease formats that are unfavorable to tenants, but landlords are willing to negotiate lease terms especially now, when it is a tenant-oriented market for many properties.

If you follow these steps, you should be able to navigate the lease minefield without a blow up! ■

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Suffering From Decision Fatigue?

A well-known phrase in today’s society is “decision fatigue”.

From the moment you wake up, you are confronted with a myriad of decisions—large and small. Most people make thousands of decisions daily.

- What shall I have for breakfast?
- What will I wear today?
- Do I refinance my house?
- How can I best help my aging parents?

Psychologists describe decision fatigue as a downward spiral of the quality of choices after a long session of making decisions. This applies to your personal life (see choices above) and to your work life. Examples include:

- Do I work from home today or go into the office?
- Do I attend the meeting or send someone in my place?
- Do I buy that new piece of equipment or make do with what we have?
- Do I hire the new college-graduate or the person with 20 years of experience?

The COVID pandemic has created even more decision fatigue for many.

- Do I get vaccinated or not?
- Do I take the booster shot or not?
- Shall I wear a mask or not?
- Do I send my kids back to school or home school them?

Fascinating studies have shown the serious effects of decision fatigue. An Israeli parole board was studied; researchers discovered that the board made more lenient decisions (granting parole) early in the morning rather than later in the day. They were also more generous in granting parole following breaks where they were given food. This New York Times article explains how decision fatigue can cause people to:

- Avoid deciding
- Make impulsive decisions
- Resort to status quo decisions

Leadership and Decision Fatigue

You make choices daily in your leadership role. Which of the following types of decisions have you faced in the past year?

This all sounds a bit daunting. If you’ve struggled with making high-quality decisions, stop and consider some recommendations for reducing decision fatigue:

1. Set up structures to reduce the number of decisions to be made. For

Yes/No	Leadership Decisions
	1. What direction shall I move my company in (or my division, department, etc.)?
	2. Shall I keep this employee, move them to another role, or let them go?
	3. Do I share bad news with key stakeholders now or try to keep it quiet for a while longer?
	4. Do I allow employees to continue working from home or mandate a return to the office?

example:

a. Agree to meet a workout buddy at 6:00 a.m. each morning rather than debating every day to work out or not work out

b. Reduce decisions by planning: meals for the week, priorities for the next day, clothing for the next day, etc.

2. Avoid scheduling back-to-back performance reviews throughout the day. Research indicates that those who are scheduled at the end of the day will probably receive the lowest quality performance feedback.

3. Include others in high-stakes decisions.

4. Make important decisions early in the day.

5. Manage your stress. Make nutrition, exercise, and relaxation priorities in your daily routine. ■

For more information contact Kathy Cooperman, KC Leadership Consulting, LLC, kathy@kathycooperman.com, 1 (866) 303-1996 or (303) 522-2114.



Your People Giving Their A-Game

*"Freeing yourself was one thing; claiming ownership of that freed self was another."
—Toni Morrison, Nobel Prize and Pulitzer Prize-winning novelist*

As business leaders, I know your greatest wish-fulfillment would be to have your entire staff show up every day on their A-game; surpassing compliance and mediocrity and instead exercising full-out commitment. Each is able to respond (response-able) regarding their purpose, values, visions, goals, procedures, roles, relationships, productivity and engagement; their life tasks.

Spitting in Your Soup

In order to get that result, I promise it is necessary for me to spit in soup you've been attached to; namely the use of control models. Most leaders use four control models focused on extrinsically motivating others, in hopes they will get their employees to bring their A-game to work and own their tasks. This consistently fails; if it were working, we would not continue to have 71% disengagement of US workers nationwide, putting at risk over \$1M for every 100 people in a typical organization (Gallup).

What do I mean by control models and why do they fail? For centuries four management approaches have been promoted, supported and protected, in which authority figures attempt to extrinsically (externally) motivate people through threats (autocratic), dangling carrots (incentives), praise and disapproval (judgement) or by pampering (enabling), in hopes this will lead to personal responsibility.

Control models are seductive because they "work" the way a gun to the head works, or a large wad of cash might get an immediate, short-term result; and NOT without highly expensive, negative side effects, including reduced self-awareness, self-management, social-awareness and relationship-management, all components of emotional and social intelligence; one's personal tasks. So, why don't these tactics work? They all:

1. Require power-over, superior/inferior and win/lose dynamics that break down trust and camaraderie

2. Involve limited, fearful beliefs about people; who then live up to your low expectations
3. Confusion about task ownership; a person responsible for a task has it hijacked by one who is not
4. Are about pleasing, owing, blindly following, jumping through hoops, all for management's needs
5. Cultivate people who at best resentfully comply, compete with team mates, become yes-men (and women), or at worst, rebel, resist, lose or drop motivation and become selfishly entitled

Task Ownership and how to Cultivate it

Simply put, task ownership is when a person is aware of, trained in, support to own, tasks that are theirs to complete. They learn self-governance and how to participate in shared power. To do this, provide:

1. Acknowledgement, guidance and respect for personal power as well as mutual respect and equality
2. A consistent positive belief in people; that all are and want to be great and that if they are not acting great, there is a defective or missing human system, not a defective person
3. Training and ongoing coaching and mentoring, for transfer of responsibility in task ownership

Having a winning team of A-game players is easier than you might imagine, especially if you are willing to go out of your way to let go of outdated thinking and behaving, without shame or fanfare. I'm here to help you and your people evolve in order to achieve outstanding performance excellence!■

Judy Ryan (judy@LifeworkSystems.com), human systems specialist, is owner of LifeWork Systems. Join her in her mission to create a world in which all people love their lives. She can also be reached at 314-239-4727.



Building Business Value

Tip 1: Avoid Owner-Dependence To Create The Business That Everyone Wants To Buy

How do you build business value and create the business that everyone wants to buy? As promised, I will highlight one tip each for three months. These strategies certainly help owners who are preparing their businesses for sale, AND help strengthen EVERY company at any phase of the business cycle. **Tip 1: Make sure your business is not owner-dependent.**

Are you personally involved in daily decisions about routine business matters? Are you responsible for key customer relationships? Are your vacations repeatedly interrupted by employees seeking your input?

If you answer yes to any of these questions, you need to shift this dynamic immediately. Owners should be focused on developing long-term strategy, analyzing trends, maximizing business value, and developing leadership in a responsible workforce. **Key employees should have the skills, knowledge and authority to run daily operations without you.**

Why is this so important?

Ramifications of an owner-dependent business:

- Employees are not independent thinkers or problem solvers. Instead of suggesting relevant improvements or feeling invested in the company's success, employees keep their heads down and just go through the motions.
- Client and vendor relationships are tied to the owner. When the owner eventually exits the business, those relationships are jeopardized.
- The organization may be on an emotional rollercoaster based on the owner's mood. Businesses operate best when employees are aware of the big-picture strategy and collaborative goals.
- The ego/identity of the owner is wrapped up in the business. This is dangerous for both the owner and the business. Owners who have hobbies and outside interests are more satisfied than those who don't. A healthy objectivity about the business provides valuable perspective for decisions.

Value Risk: High

Businesses that cannot pass the "hit-by-a-bus" scenario have very little true value. At some point, every business owner will exit, one way or another. For a business to survive that transition, it cannot be dependent on one individual (or partnership).

Banks recognize this risk and are hesitant to lend to owner-dependent companies that want to expand. Prospective buyers will quickly realize the business isn't worth much if the most valuable asset will be walking out the door post-sale.

Any characteristic that makes the risk of acquiring your business high is also detrimental to current value and profitability. Successful businesses are built on repeatability of processes and incremental improvements. When eventually selling the business, a buyer needs to be confident that successors can continue (and grow) the company's success. If the current owner is presented as the reason behind every achievement, the buyer will question whether they can smoothly step in and fill those shoes. Certainly, the owner is ultimately responsible for **building a successful business and that is to be respected, but ongoing operations and performance should not be contingent on the owner.**

Solutions:

So, what if an objective look at your company reveals that it is owner-dependent?

First, put aside any ego and acknowledge that you should be the least important person in the organization. Then, take solid steps to make that a reality.

Develop a second, third and fourth person in command, and ensure they are well trained, committed to the company's strategic vision and growth, and capable of leading. The time you invest in developing these leaders will exponentially increase business value.

This is key: You must truly delegate responsibility and AUTHORITY! Empower your managers to make decisions without running everything past you. Focus on results rather than micromanaging or second-guessing their processes. Then stand behind your managers and signal that support to the rest of your employees. Support in public, counsel in private.

Regardless of your timeline to exit your business, viewing your company honestly from the perspective of a buyer will boost business value. ■

Dave Driscoll is president of Metro Business Advisors, a business brokerage, valuation and exit planning firm helping owners of companies with revenue up to \$20 million sell their most valuable asset. Reach Dave at DDriscoll@MetroBusinessAdvisors.com or 314-303-5600. For more information, visit www.MetroBusinessAdvisors.com.



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