



Director of Operations

April 2019

SYLLABUS

Operational Foundations (DOO Client Onboarding)

- Mission, Vision, Values
- Strategic Mapping™
- What are KPIs
- Building a dashboard
- Business Hub set up

Project Management

- What defines a project
- How to create a project plan
- Project Management software
- Assigning ownership
- Why milestones are critical
- Scope management
- Follow up system
- Outsourcing tasks
- Workflows and processes
- Process hierarchy
- Documenting processes

Human Resources

- Talent/team management
- Kolbe assessment
- Scaling business by utilizing human capital
- How to hire: Hiring Simplified™
- Team leadership
- Gold standard for leading meetings with agendas
- Managing morale and staying connected
- HR legal information and practices

Financials

- Financial acumen (terms to know)
- Setting up Profit + Loss statements
- Establishing thresholds or percentages for review
- Quarterly review of financials
- Understanding ROI
- Tax knowledge and bookkeeping practices

Communication

- Client management
- Client communication best practices
- How to facilitate difficult conversations
- Conflict resolution
- Meeting management

Mindset

- Worthiness of your position
- Boundaries to consider
- Stepping into the DOO role

Business Practices

- Various business models to consider (Natalie's business journey: offers, pricing, avatar)
- Pricing your services
- Developing/suggesting incentive pay (profit share or bonus structure)