

Q&A with A&J Presents:

# HELP! MY BOSS HAS TOO MANY GREAT IDEAS!

How to wrangle a leader that is  
a visionary.

**1** STEP  
BOLD

# Welcome!

- Ground Rules
- Introductions
- Our Why
- Presentation
- Q & A and Discussion

# Ground Rules

1. You're muted so use chat, or unmute yourself to ask questions.
2. Be respectful. When you're not muted everyone can hear and see you.
3. If we don't get to your question you'll be able to email us and we'll send an answer.
4. We will end early or right on time.

# 1 Bold Step

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We believe that everything can be more efficient; but especially the sales and marketing process. So we apply LEAN principles to create systems, order, and accountability to generate demand, increase sales, and prove return on marketing investment.

We believe that marketing is measurable, and therefore manageable, **VALUE-ADD (and not OVERHEAD)**.



# Mike Schipper - A Visionary

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CEO and Founder of [InsIte Business Solutions](#) in Zeeland, MI, Mike's passion is to serve people in any way that he can. Be it helping an employee set and reach their goals, developing positive company culture, creating synergy between people and process, or helping a client understand how strategic technology investments can positively impact their business; he enjoys it all.

As an expert in business technology, IT consulting, cloud solutions/hosting, and business strategy, Mike approaches everything with a purpose to drive higher value for businesses and create new successes through technology.



# Why Q & A with A & J?

There's so much going on; wouldn't you like to be able to ask marketing experts questions and get straight (and free) answers?

## We thought, yes!

We all have a little Zoom fatigue so let's make this interactive.

# Visionary or Integrator CEO?

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## Visionary

- Loves big ideas
- Moves from project to project before completion
- Good with big relationships
- Embodies the culture of the company
- Closes the big deals
- Has a passion for discovery and innovation
- Operates on hope and emotion

## Integrator

- Heads up leadership team meetings
- Operates on results and logic
- Good at finding resolution and negotiating conflict
- Sees realism over idealism
- Likes to keep things moving and on time
- Strong project management skills
- Accountable for P&L



# Why Organizations Need Both

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- Visionaries see the future and know where to go, Integrators get them there.
- Without both roles filled, a team can get very confused and/or discouraged.
- A vision needs to be cast and also articulated to the team correctly
- One is the “Why”, and the other is the “How.”



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## Tips & Tricks

How to align with a Visionary Leader



# Implement an Agile Approach



- **Mindset shift:** Marketers on an Agile team think about their work differently. They exhibit respect, collaboration, improvement and learning cycles, pride in ownership, focus on delivering value, and the *ability to adapt to change*.
  - **Experimentation, iteration, and small releases:** Rigid, long-term plans don't fit with an Agile environment. Instead, you should see lots of small experiments being released frequently. Then the team applies the results of those experiments to their next round of work.
- **Commitment to Agile:** You have to stick to your plan and meeting cadence.
  - **Servant leadership:** Focus on helping the team succeed, not old school command & control management.
  - **Teamwork and collaboration:** Individuals on an Agile team also behave in distinct ways, always looking for ways to join forces to do better work in a more efficient way.
  - **Data-driven marketing:** All modern marketing teams need data to guide their efforts, but Agile teams are really and truly driven by their data — otherwise how would they know if their experiments were successful? They make sure all of their work *can be measured*, and they rely on empirical evidence to make decisions.

# How Does Agile Work?

There are a handful of project management philosophies (frameworks) that are used by agile organizations to prioritize and accomplish work. Some of these are called Scrum, Kanban, Scrumban, and Lean. All of them do basically the same thing:

1. They identify a finite amount of work to do during a short amount of time.
2. This work is pulled from a prioritized backlog of work.
3. Then, the team focuses on accomplishing that work during a period of 2 to 4 weeks.
4. After the work is done, the team reviews its successes and failures as a means to improve the way it works.
5. Then it pulls more work from the backlog and works for another 2 to 4 weeks.

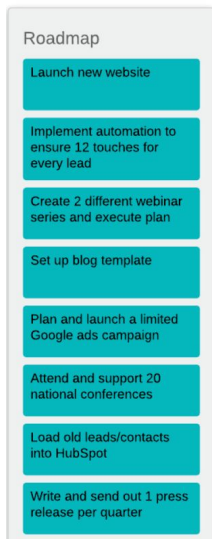
Working in these short intervals allows the team to have interactive build-learn-adapt cycles ensuring that it is always responding to company needs (& the Visionary) in the most efficient manner.

# Agile Example

## Board #1:

### The Roadmap

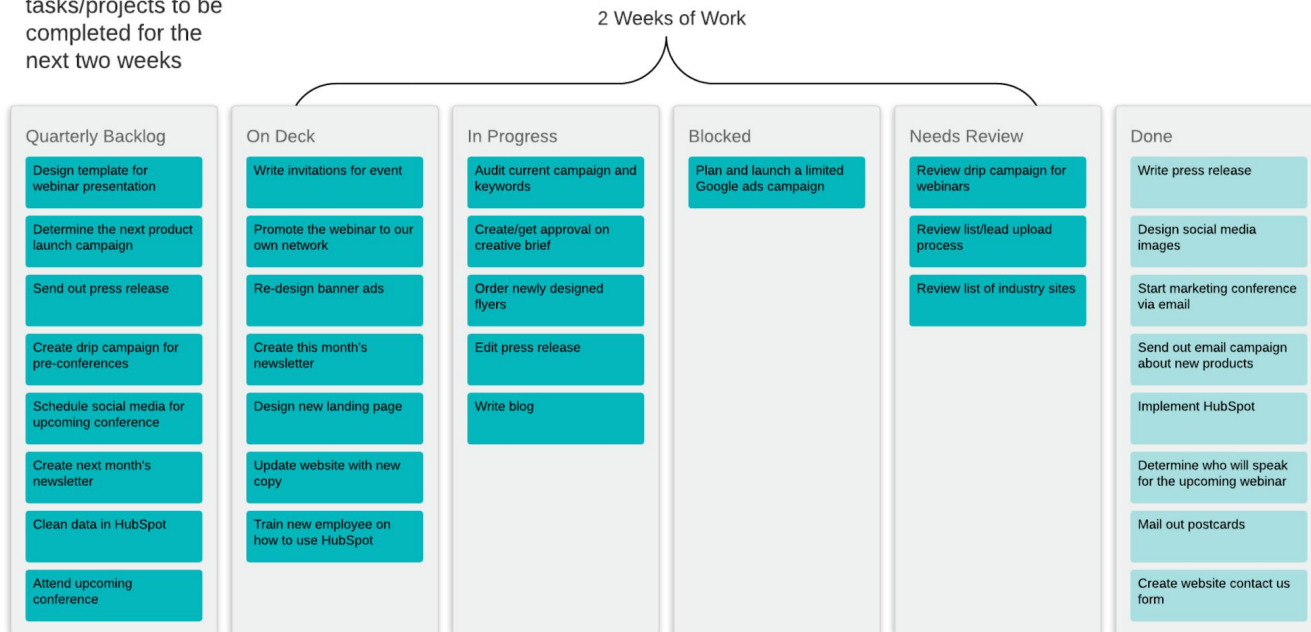
A high-level of all of the tasks and initiatives for the year



## Board #2:

### The Sprint

An overview of all tasks/projects to be completed for the next two weeks



# Meetings and Report Card

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- Annual planning
- Quarterly
  - Look back: ROI & win/loss assessment
  - Look forward: Are you still working on the right things?
- Monthly - Report Card Review
- Bi-weekly Project Sprint
- (optional) Daily Stand-up

Set your goals & track against them with a **visual** report card:

Ex. Marketing Goals

- The total sales against the goal (you're a team)
- The percent of revenue from marketing-generated leads
- Lead-to-customer close percentage
- Number of marketing-generated leads / leads by stage
- Number of leads that became customers

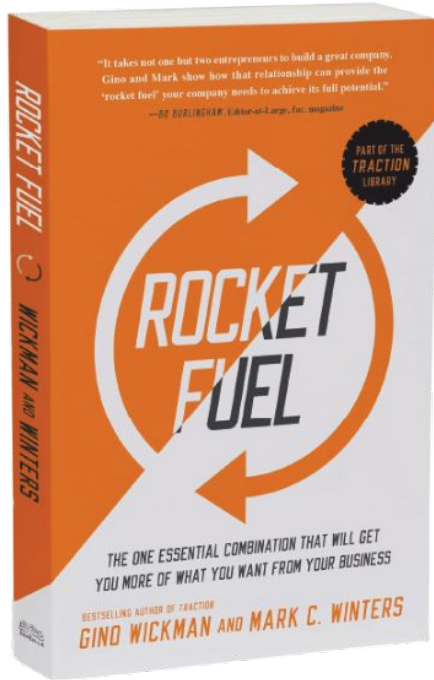
# The Disney Drawer



- It's not a "no"... It's a "not right now."
- Keep a running list of your visionary's ideas with any details provided.
- Sort them every quarter (or during your roadmap review if you're running Agile) based on priorities.
- Task out the ones that become a priority into the next quarter's workload.



# Tips and Tricks Recap



- Agile Approach
- Disney Drawer
- Marketing Report Card
- 7 times...
- “Inventory Mindset”



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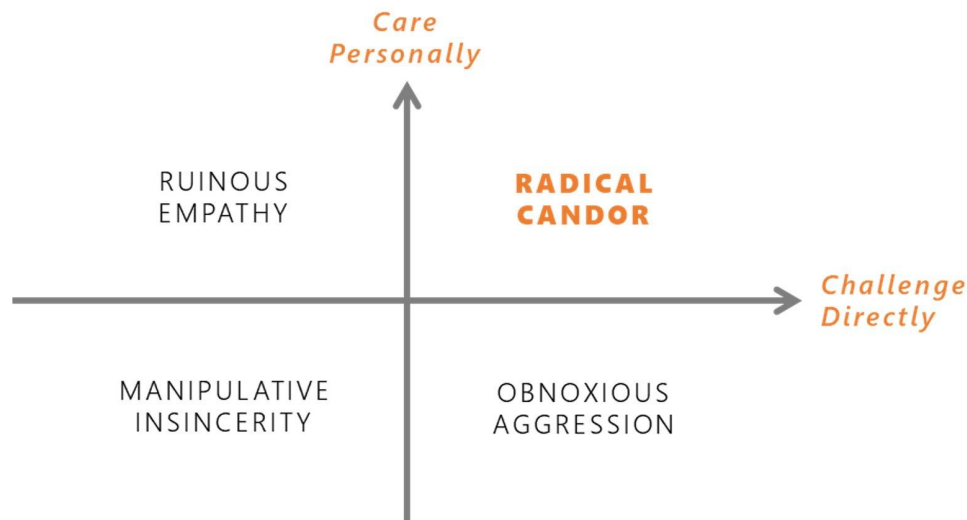
## Q&A





# Q&A

I would love to hear tactful ways to encourage a visionary to take a breath/step back and really vet a new idea or program instead of immediately saying yes to everything that sounds interesting.



Concept: Kim Scott, 2017, [www.radicalcandor.com](http://www.radicalcandor.com)  
Image: Takeshi Yoshida, 2018



# Q&A

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How do you handle two visionary leaders who do not agree and have created a roadblock for growth?



## Q&A

What's the balance between "allowing" my boss to dream, and keeping him/her from derailing our plans?

# How do you say "hang on a minute" without dampening enthusiasm?

# How to prevent an 'idea' person from constantly going down new rabbit holes instead of focusing on high level plans/needs?

## Q&A

Once you wrangle the visionary ideas and how do you ensure the strategic alignment throughout the organization?

## Q&A

Do you agree that middle management needs to buy-in to the vision and strategic alignment before execution of the visionary idea can occur?

# Q&A

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How can we effectively get the visionary to follow through with their ideas from start to finish?



# Q&A

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When balancing your marketing, boss, and team member's (sales and account managers) priorities – how do you prioritize what gets done first or at all?

As a small business, how do you decide which “ideas” should be implemented and which have to wait simply due to limited resources?



# Q&A

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How do we keep track of the tasks and the process to follow to see if they are worth pursuing?





# Next Steps...

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1. Take our Survey
2. Comment on the video or blog when we post it.
3. If you found it valuable, share it with others.



