



MOVE YOUR ASSOCIATION FROM DEFENSE TO OFFENSE, WITH ANDY BAILEY

Petra Coach founder Andy Bailey joined Sidecar for a webinar on April 28, 2020. This is a transcript of that event.

Chelsea Brasted: Hey, everyone. My name is Chelsea Brasted, and I'm the Content Manager for Sidecar where our core purpose is to build badass leaders. And we do that by hosting virtual events like this one, so that we can bring diverse thought leadership from around the world together to the association space. We also publish a blog dedicated to the ideas, suggestions and creative problem solving that can help the association industry evolve. We also offer our membership with access to innovative educational tools, video, and an online community.

But today, we are going to pass the mic to Andy Bailey. He's the leader of Petra Coach, an entrepreneurial coaching firm dedicated to helping businesses grow and thrive. So as we're all facing the fallout and continued uncertainty the coronavirus has brought to every single industry, Andy is going to tackle how to take your association from playing defense to playing offense, even as we're facing this global disruption. So you will leave with workable tools to help you figure out your own association's path forward. So with that, may I introduce Andy Bailey?

Andy Bailey: Hi, my name is Andy Bailey. I am the founder of Petra Coach, where traditionally we work with organizations to help them scale, grow. Over the last six and a half to seven weeks, we've been working with organizations to help them survive, and survival for a period of time, and then moving towards resetting and scaling again. And we've devised a kind of methodology along with tool sets to go along with the methodology and a thought process to move people from playing defense through stabilization to resetting, and then getting into playing offense again. And sometimes for some companies and for some teams, that's doing something completely different than what they were before, and sometimes it's adding different customers than they had before or different clients than they had before, in our case, maybe different members that we had before, but sometimes it's just a thought process and how you can think about things a bit differently.

So I'm going to walk you through a presentation today to get you thinking in these four quadrants. I'm going to give you some tools that you can take away and work with your teams to do exactly the same. And the unique opportunity here is as I go through this, as an association, I want you to think about how your members and the companies that you serve might benefit from this presentation and from these tools and potentially from the workshops, which I'm going to walk you through as well.

So there might be something here for you to add additional value to those people, the people that you serve every day. And if that's the case, please let us know. Obviously, I want you to think about the concepts in here as we go for yourself and how you can put them to

work for yourself. So we'll go through some of the slides, and since I'm recording this, it won't be much of a conversation going back and forth, but we'll do the best we can.

I'll start with a little bit of humor. Somebody sent me this the other day. I thought it was kind of cool. Isaac Newton discovered calculus while in quarantine, William Shakespeare wrote "King Lear" during quarantine, and we will learn how to unmute our computer's microphone during a Zoom meeting while in quarantine. Oh, if you're like me, the number of times I've said, "You're on mute, unmute," has been, like, exponential these past few days.

Few ground rules. If I had you live everybody would on video, and we would do that with anybody that will participate. I like to see the people's faces so we can see what's happening. We would also ask that it was very interactive because we want people to ask questions. Again, if we're doing this for your members or for your audience in any way, we want it to be very interactive so when a question comes up, they can ask it and we'll get an answer. Here because this is recorded, you can ask those in the Q&A in the chat box and we are manning that. So feel free to ask any questions, we'll answer them in real time that way.

And then as we go through the slides and as we have a conversation, I want you to make sure that you're looking for ways to improve and take action. There is a whole lot of information out there right now. I think what might be a bit lacking is taking action on that information. So how do you improve? And then how do you take action?

I'll start with a story. I call myself a 14'er. There are a few people that are 14'ers. If you're a 14'er, what that means essentially is that you do mountaineering, and there are, in the state of Colorado, 53 mountains that are above 14,000 feet in altitude, so they call those mountains 14'ers. And I have a list in my office where I go through and check them off every time I do one, and my goal obviously is to do as many as I possibly can. And this one we did... I do these with a couple of friends of mine, Jeremy and Shawn, and we typically go in the summertime. They're difficult to do in the winter obviously because they're covered with snow. And two years ago, we did this one called Longs Peak, and it's known as the deadliest 14'er in Colorado. That day, 16.74 miles, and it took us 11 hours and 47 minutes to go to the summit.

The arrow on the right is what's called the keyhole, so you kind of go across this path up through the keyhole, around the back of the mountain to get to the summit. And at this point when we got to here, we were probably somewhere around five hours into the hike already. Almost 30,000 steps, 5,300 feet again, and it took us, again, almost 12 hours to do it and six and a half hours of that climb, we were above what's known as the tree line. Trees don't grow above 10,000 feet. There's not enough oxygen and the air is not conducive for plants to grow. So trees don't grow up there and it's very, very difficult to breathe or climb or do anything at that altitude.

The interesting thing about this story is that I was thinking about this a couple of weeks ago and some of the things that we're all going through in business, and two days prior to this particular climb at Longs Peak, we did another 14'er, not nearly as arduous, but certainly a long day. And I'd had a brand new pair of boots on. I had worn them a few times. I hadn't hiked in them to any degree, but I had worn them on the hike two days prior, and when I

did that, I wore through the heels of my feet. So they had rubbed and rubbed and rubbed and rubbed and rubbed to a point where there was these massive, bloody, gnarly holes in the heels of my feet and I did the best I could, I put Moleskin on them and wrapped them up good, but I had to shove them back in those boots two days later and climb up here through this keyhole, around back of this mountain to do the ascent.

On this trip, as I'm climbing, there were a couple of times where Jeremy was right in front of me and he had his backpack on. He's probably 20 feet right in front of me the entire day, and there were a couple of times that I leaned to Jeremy and said, "Jeremy, give me the keys, I'm going back to the car. You guys finished the hike and I'll see you when you're done." He would turn and look at me and he's like, "No way, I'm not giving you the keys. You're going to finish this. You started it, you're going to finish it." I'm like, "Dude." Not only the normal things where you can't breathe, you're disoriented, your brain's telling you to stop, you could almost die because you could fall off the side of this, but I'm in this excruciating pain from these wounds on my feet and he wouldn't let me quit. I mean, wouldn't give me the keys, so what am I going to get to do? Stand in the parking lot?

So I kept moving step after step after step after step after step. This is the last 1100 feet and it's just almost vertical, straight up. It's around to the backside of the mountain, and above there is the summit. You can kind of see it on the top. And this is not too bad to actually go up, but coming down this thing, because your crab crawling backwards to keep from sliding off head first, it's a little bit crazy. It's just an arduous, arduous climb, but you get to the summit, right? So I get through the entire thing, and then you have to go all the way down, which is the other half of the entire hike.

When I was thinking about this hike that I had and comparing it to what we've all been through in business over the last six weeks, this kind of concept of one step at a time, one step at a time, one step at a time, and playing defense to get to stabilization, to get to reset, to get to offense, and the repeating of that over and over, if you think about it, on the side of this mountain you're climbing, right? So you're fighting off your brain. There's like a tiger screaming in the side of your face the entire time. Your brain wants to stop, you're in all kinds of pain, you can't breathe, your heart's pounding out of your chest, and then you stop for a second.

So you might go 100 feet or 200 feet or 25 feet depending on where you are, but you're playing defense that entire time, you're fighting off all these things that are coming at you, and then you stop for a second and you stabilize. You get your heart rate down, you get your breath back, you kind of ease into what's happening. And we always had a check in where we would say, "On a scale of zero to 10, where are you?" And we had a deal that if anybody ever said they were under a six, that we would turn around. So you had to be above a six or you couldn't continue down the path.

So we get to stabilization, and then you reset. So you're on the side of the mountain and you're kind of stable now, you feel like you're ready to go, and you reset. And the reset essentially is, you're in this place. When you pick a point in the future, you can pick a point on the side of the mountain, you say, "I'm going to go there." When you like visually get your little path out, you figure out how you're going to scramble over to that particular spot, and then you play offense and you start to scramble, right? So you're moving along,

moving along, moving along, you're consuming fuel, you're drinking your water, you're playing offense, and then you get to the point of playing defense again, and it all starts over. It's defense, stabilize, reset, offensive.

We've been doing this in business forever. This is the way we play the game of business. We play defense, we get stabilized, we play reset, and what's the reset look like? And then we go on offense and we repeat it. Now, the difference is, in the last six weeks, we've been playing a lot defense, a lot of defense. We're going to talk about each of these four areas and I'm going to give you concepts and ideas of how to play these areas as well as how to move from one to the other because I've seen a lot of businesses get stuck in this defense stabilize area, and they go back to defense, and they get to stabilized, and they go back to defense, and the key here for the future is to get to reset and to get to offense as quickly as possible. So let's talk about these and I'll give you some tools.

At the very end of this presentation, I'm going to show you each of these tools, and then I'm going to give you access to what we call the vault and you can go in and get these tools, you can put them to work inside of your organization right away. And then, again, at the end, I'm also going to invite you to a workshop. So if you want to take the tools and put them to work in your organization, that's cool, totally do that. Or if you'd like for us to work with you on these tools, I'm going to give you special access to be able to do that too. So just know that that's coming.

So the first thing to kind of think through in this concept of DSRO is what does your battlefield even look like? For many businesses, and we work with a little over 100 companies between our offices in the U.S. and our offices in the UK, the battlefields have been redefined to a degree and understanding what the battlefield even looks like right now, it can be a bit of a challenge. And one way that we found to do that is to go back to a long time standing tool that we've used in organizations forever called SWOT, and everybody knows what SWOT is, strengths, weaknesses, opportunities and threats, but we don't really use it. Many companies and many organizations just fill it out and they kind of stick it in the drawer and they might pull it out once a year when they go through annual planning, but we turned it into what we call the short term SWOT. And short term, we've seen this with companies that we work with, can be as short as a week. Usually it's about a month, and right now it might be as long as 90 days.

The idea is you take this tool and you hand it out to your team and they all fill it out. So they fill out what are the strengths right now, what are the weaknesses, opportunities, and threats based on these very specific definitions. So what are the internal capabilities, attributes, skills, and/or assets within your control that you need to ensure you are protecting more than ever in this short term period, so very specific questions for the time that we're in, in all four of these categories. Once you collect all that information, you can sit down and have a meeting about it, a little bit of an unpack so you can see exactly where you need to go play, what does your battlefield actually look like? And once you have the data, it becomes a lot easier to move things forward.

So that's kind of the first thing, it's figure out where your battlefield is and you're going to move into defense. I'll talk about defense. Many of you on this webinar have been playing defense already. Some of the things I'm going to review really quickly, you've already done.

I believe that defense is an IQ area. It's kind of intelligence quotient area and people get thinking exercise. I'm going to give you this tool as well, but it's a crisis checklist. We've met with companies probably about 60 in the last month where we've done this crisis checklist with them, essentially the same kind of exercise you handed out to your entire team, they score these different scenarios, there's 20 different scenarios and they score from zero to 10, 10 being the one that we should be paying attention to, zero is we don't need to be paying attention to that. You come back together and you work on the three to five that everybody agrees are really important. So, very powerful tool.

Of those 60 companies, even the ones that said, "Yeah, yeah, we're through that part of it," there are always one or two things they hadn't gotten to yet. So I encouraging when you get this tool, use it because it will allow you to play defense in an area that you may not have played defense yet, that might come back to kind of bite you in the butt if you don't get it done well.

And then thinking about defense, these are the areas that you want to be focused on, obviously, health, safety and wellbeing. The work from home, I mean, we've been doing that for a month now. Candor and transparency, right? Conserving cash and doing it the right way. There's also this kind of CARES Act, SBA, EIDL, there's now main street funds out there. There are things that we can do to continue to play defense. And then what are we doing with layoffs, reduction in hours, furloughs, and I'll talk about these categories kind of as we go.

Obviously ensuring health, along with the mental health as well. So it's really serious that we need to pay attention to what's happening obviously with our team members. If you still have offices open, there's a whole series of protocols that you have to take care of. This concept of mental health is probably going to be a next big wave that we have to pay attention to. So get in front of those things and make sure you're telling the truth and providing reassurance as you go through it.

I put on here this thing called provide access. I find as business leaders, we have access to stuff, right? Access to people, access to things, just access in general that usually our team members don't have. And this is a time where that access that we have can be incredibly valuable to our team members. So think about how something you have access to might serve a team member very well right now. I had access, at the beginning of this, to intravenous vitamin C I'd always gotten. I'm a bit of a fitness person, so intravenous vitamins in general, I was doing that for a few years. And when this outbreak came, intravenous vitamin C was one of the protocols for boosting your immune system, so I asked my team if anybody would like to have that, I would provide that for them, I'd give them access to it, and we did that. So think about things that you have access to that might be beneficial for your teams.

And then obviously obsess over cash. Reduce cost where you can, but invest where it is needed, and I'll talk about that in a bit. Most of you have probably already been through in cleaning out your closet, meaning you haven't taken your credit card bill or gone through their line by line by line to find the \$32 charge that comes every single month that you used to just not pay attention to and you don't use that app anymore, so you need to get that cleaned off. It's a time for you to go do that if you haven't done it already. And what I'm

finding in my own organization is there's a lot of that stuff that was just hanging out there. If it is not providing value, let's get it gone.

And then managing the cash in, making sure that our accounts receivable is coming in as quickly as it possibly can, whether that be from sponsorship or from traditional business AR, and then finding those resources. We'll talk about resources.

So this is kind of the area that you want to be thinking in speeding up the AR, slowing down the AP, and then how do I get funding? How do I get access to dollars if I didn't have access prior?

I'll give you this presentation. It will be something you can go back to. This is just a checklist that we created for ways to receive money faster, ways to disburse money slower, and then looking at refinancing, et cetera. Some of these can be as easy as moving from one credit card to another credit card. How do you reduce cash spin and hang on to more than you had before?

And then this is always on everybody's list, right? So we're looking at our teams to see if there are people on the team that we will have to lay off, we'll have to furlough. And the number of times I've had this conversation is a lot. I also have a lot of times where people will say, the people that we let go, there are some of them we won't bring back because we should have let some of those people go two years ago, and we've known it for two years, we just hadn't acted on it. So there is a little bit of that at play as well.

So most of you have played defense already, and maybe get into the stabilized section, and maybe even in your organization, get into resetting and playing offense. So I'm not going to spend a ton of time on defense, however, I will say this, you're going to come back to defense. Organizations that prior to this kind of disruption had done a good job saving money, which is a defensive move, aren't having as big a challenge right now as the ones who spent all of their money. So that's a defensive move. Whether you can get back to that defense kind of move right now or not, I don't know, but there are plenty of defensive moves that you're going to have to make. That's why I said on the side of that mountain, we play defense, we stabilize, we reset, and we play offense and we repeat that over and over. We have to make sure we're playing defense even once we get out there and start playing off once again.

So stabilize section, let's talk about stability and getting to stabilization. I think this is an emotional quotient section, so it's a little bit more about people and I like this image because it's kind of how we're doing right now and most of us are feeling a little bit like this image, at least I am from time to time. So communication being obvious, something that we're going to have to do to get stabilized. I'll talk to you about daily huddles, dashboards, et cetera. So I'll jump into this pretty quickly.

I got this graph from a friend of mine, John Spence, and he explained this in a webinar that he did with our company. This kind of stability to immobilization, denial, anger, bargaining, depression, testing, acceptance, and then it just rolls all over again. Much like DSRO for your business, this is the emotional response that we go through on a regular basis. Some people are going to go through this cycle every day or multiple times a day, some people will go through this weekly, some people monthly, but you need to recognize it, I think.

Especially as a leader of a business and somebody who's responsible for team members, the recognition that this is happening, and if you can kind of put or plot yourself and other people in this graph, I find it very helpful to observe and then handle some of those situations. So I thought this was a really good ad.

And then communication daily huddles. So if you've got a team of people, communication being like the biggest thing right now, daily huddles is a great way to spin up quick communication. And when we coach companies, we're always going to talk to them in terms of having a daily huddle, usually it's 15 minutes or less. I'm finding that huddles these days are longer than that because there's just a lot going on, a lot to communicate. I'm also finding that, at least for me, I'm having to repeat myself a lot more than I used to to get the message across. But this kind of huddling during a crisis time period, this gives you a framework of how to do that, making sure you have conferencing on, doing multiple rounds, asking very specific questions, those things that people should be ready to report. Some of this is tactical, what's happening in the business, and some of it is kind of personal, what's happening with them.

We do have a tool for this. So we have a meeting rhythm creation worksheet, and this will be in the vault for you to access after, where you can sit down and kind of design what your meeting rhythms need to be. And then we have a daily huddle agenda that'll help you walk through creating your own daily huddle. So you don't have to write all this down really fast. It's all captured in here for you and it would be in the vault at the very end. Just remember that doing a daily huddle is highly impactful and important.

And then creating yourself some sort of a dashboard. This is the dashboard that we use. It gives us a visibility into some very important critical numbers. You'll see that in the upper right hand side on this slide. These are our three big critical numbers for the period that we're in. Bottom right hand side is our daily huddle view, so we're putting in our meeting rhythms in there. And then on the left hand side are our priorities, things that are important that we're working on right now, and it gives us just a visual image of what's going on in the organization. As we're more and more removed from each other, I'm just finding it having these dashboards and having these systems are more important for the organization from a communication standpoint and from an understanding of just what people are doing.

And then communication with customers and vendors. John DiJulius has this concept called F.O.R.D., which is family, occupation, recreation and dreams, and it's a conversation framework. We feel like the communication right now with customers, or in your case, members, and any vendors that communication needs to be really, really active, this gives a framework to actually have the conversation. So if you think in terms of family, how is your family dealing with this? Occupation, how are you feeling about this right now? And maybe how's your job or how's the organization? What do you do for fun? How's this affecting it? What are you doing that gets you away from COVID-19 or away from work at this time? And then thinking in terms of the future, what's your single biggest kind of dream into the future? So getting them to talk about things that they feel like would be outside of the immediacy, but again, F.O.R.D. being a good framework for that.

And then this is another kind of stabilization piece. For us, and we work with companies for the most part, right? So we work and we do quarterly planning sessions and strategic planning and execution and things like that. But when this disruption arose around COVID-19, we started getting this floods of questions and we had to get into discovery mode really fast. But rather than being on the phone or on Zoom answering all those questions, we felt like we could spin up a resource for it. So we put together a COVID-19 resource center, which you can access on our website at petracoach.com, but think about what can you provide your customers, your members and others that might be helpful right now because you offload some work. For us, it was answering the same questions over and over. We could put an FAQ online, could we get those questions answered sooner and quicker? And then how can we become even more valuable right now? That's a good question to ask your team, and how can you do it in a way that uses technology? So that's on there.

And then stabilization around where you are today and where you might go in the future. If you haven't done this exercise yet, you need to do it. And I put it in stabilization rather than in defense because what it did for us when we walked through it and what it does for the companies when we walk them through it is give them a sense of stability, and I'll explain what this looks like. So essentially all this is, is it's a calculator, it's Excel spreadsheet that has formulas that allows you to look at financially where you are right now and financially where you would be if it continued to drop. So if we went down another 10%, this is what the numbers would look like. And then you look at that and say, well, what will we need to do should that happen? So it's what if, what if this happens? Then what do we do?

You're going to map that or you should map that out over the course of 10, 25, 50, you pick your own percentages. We did now 35 and 50. And then we took all of that data and information and we fed it right back to our team and we said, "Look, here's where we are now." We had some loss in business just like most people, "Here's where we are now. Should we get to 35%, this is what will happen. Should we get to 50%, this is what will happen." We were very clear. And then the followup statement was, "And we all have the ability working together to keep us from hitting the 35% and the 50%. Here are all the things that each of you can do to ensure that we don't get there." And then we put a critical number up on the dashboard, and we watch it and report it every single day.

Just remember this is the statement at the bottom that in the absence of information, there will be worry, fear and anxiety. So if you're not willing to get it out there and talk about these things, it gets created without you anyway. People are going to make assumptions and all kinds of made up things. I just felt like let's figure out what the math looks like, let's figure out what we're going to do should we hit it, and let's communicate it.

And then my friend Dave Randell gave me this and it kind of hit me in the face when I got it, but essentially it means, as influence increases, so does suffering. So in your business, as the leader in your association, as the leader in your home sometimes as the leader, as your influence increases, suffering also increases. I've noticed this to be very true, especially right now when we have to move quickly and make decisions fast and test things and do stuff. Sometimes it's very positive and move things forward, sometimes it's just really, really tough conversations. As influence goes up, and we got to take on a lot more suffering. He

also gave me tons of examples of world leaders that were good and kind of reflections of this graph. So I thought it was worth sharing.

And then getting to reset. So we talked about defense, we got down to stabilization, gave you some stuff in there and some tools and things to go do, and now we're working on reset. So let's talk about reset. Reset gets us from IQ to EQ, down into what's known as AQ. So AQ is this agility quotient, so if you think about the ability to move and do things quickly, so being very agile. I'll talk through each of these, pick a target, listener to your customer, what solutions are in demand. This is where you look into do something potentially a little bit different than you've done in the past.

Let's talk about pick a target first. So the question we get is things like, when will this be over? When will we be back to normal? What's the economy going to do? All of those kind of big, gnarly questions that nobody really has an answer to at this moment. We just have enough information to make a best guess. So this is a chart that I grabbed and it shows kind of this V-shaped recovery, U-shaped recovery or longer term, so May, summertime, and fall. I don't know the answer to this question. I do know that we need to pick a target.

So what we've done is we've chosen a date in the future that says, this is when we plan to return to the office, this is when we plan to travel again. I think we booked about 3000 flights in 2019, so we traveled quite a bit. This is when we plan to travel again, this is when we X, this is when we X. But we're picking dates in the future, and we'll adjust them as we get closer to them and have more information, but something about picking those dates gives us the ability to move towards them. So it's almost like I'm going there. On the side of the mountain we go, "I'm going to that third rock, that big one with that pointing thing on top." And then you make your path towards there. But without any kind of a direction towards the target, everybody's just going in all kinds of different directions. So picking a target, whether it be absolutely true or not is very, very essential.

And then when you're talking to your customers, in your case, if it's your member, we use this concept known as 4Q. What are the four questions? How are you doing? How's your industry doing? What's going on in your industry? And then how are we doing? And then how might we be helpful right now? It may be that what you do is not something they need right now, the traditional what you do, but it may be that something you could be doing is something that they need right now. So think about if you just ask the question, how might we be helpful? What could you discover in that particular question that would allow you to change something about the way your organization works today and potentially serve in a greater demand in the future. So again, 4Q questions.

So the idea is you have a lot of people asking those questions, you bring all of it back to some kind of an executive team on a regular basis, whether it's daily or weekly, put together a small task force and you start creating solutions and opportunities into the future. I've asked the question, how might I be helpful? And it's an answer that's not something that I normally would do. We want to discover is there something I should be doing? And then finally close the loop with the client, or in your case, the member, right? So you've got to go back to them and say, "Hey, thanks for sharing that. This is what we're going to do about it." So keep that in mind.

This walk a mile in your customer, in your case, member's shoes, really important. I know as an association it's something that you feel like you're really, really close to what's going on in their business. Step away from your business for a little bit and really spend some time in their shoes. I think, at least for us, because we spent a ton of time in our... we call our clients members as well, in our members like in their homes sometimes, in their offices for sure. That gives us the ability to know exactly what they're going through. So understand that to figure out where you might need to make a little bit of a pivot.

And then think about what industries are on the boom right now, and then how might you find them? How might an industry that's growing like crazy. Number one selling product right now is rubber gloves, gym equipment is for sale like crazy right now. You can't find it. My gym shut down. I wanted to put some stuff in the garage, I can't even find gym equipment. So what out there is booming right now and what's declining right now? And think about how your association might solve or fit into one or more of those puzzles. From your members' standpoint, this is going to be that customer driven on their side. So these are questions that they're going to need to think about, potentially a new customer in your market or how they're going to serve their existing customers in a different way.

And then this is very powerful. Most of you, like me, had a list of things that you always wanted to do in your business or in your association. You said, "Hey, if we did this, if we'd already had this, we'd have already been ready for what happened last week, last month," right? So, many of us already know that what we need to change to is something that we knew months or even years ago. So think about that, something that you've had on your list that you already knew you needed to do, and is that something that you really need to go do right now?

Pain creates the opportunity. When we get in this pain of, oh, it's not going so well right now, oh, revenues are dropping, or members are dropping, or clients are dropping, or things are going in a very bad direction, that pain will create opportunity. You will make change because of that pain. And I need you to think through what is the next pain. That next pain may not be directed at you, it may be directed somewhere else, but that next pain is also going to create opportunity, and how could you be in the right place to consume some of that next opportunity.

Let's talk about offense. Offense, I like. So again, continuing that theme of agility quotient, so how agile are we? We're going to look to define what our business looks like might you be offering, who's the new customer? Marketing right now is very inexpensive, so always thinking in that regard. Hiring is easy. We'll talk more about these things. But look in the marketplace, whether this be for your members or for you as an association, and think about where is the money and what is it that they need? Likely in places we never looked before, and then defining their persona. This is a pretty standard way of going to market with anything, but something that's different right now a bit.

And then think about the 25 people that you have not been able to get in touch with in the last five years and you really want to. So that 25 dream client list, dream member list, dream contact list. You probably have a list of people or people that you really know you need to be aligned with in some way, whether they need to be your member, your client, your customer, your friend, your advocate, whatever, those people right now are locked up

in their homes just like you are and they're way more accessible than they ever have been. They're not on airplanes flying around the world, they're not in business meetings all day long with people in rooms, and you can usually get to them right now. So if you don't take anything else away from this presentation, take away that you can get to people you never got to before, and now is the time to do that.

And then think before you market. I actually got this in my feed the other day, maybe two weeks ago, this company called Moorings that was wanting me to invest long term enjoyment in a yacht, and I'm like, "I don't feel like it's a great time for you to be sending me that." And this is a good offense story. So when you're thinking about where do we go play offense, do we spend money right now, it's hard and our budgets are way off, our receivables are way down, think about Post and think about Kellogg's. So Posts and Kellogg's, two cereal companies during the great depression in the '30s. Post decided that they were going to hang on to cash, they weren't going to do anything for advertising. Kellogg's had this new cereal called Rice Krispies and they said, "Nope, right now is our time. Even though the economy is tanked, we are going to spend money and we're going to take Rice Krispies and make sure everybody knows about it." Well, today obviously everybody knows about it, but not in the 1930s.

This line at the very bottom is what I want you to pay attention to, where it says, "How many billions of packets of cereal have been sold over the last century as a result of that single proactive decision?" I'm not suggesting that you drain your coffers on advertising by any means, but certainly think about advertising is less expensive right now, so is there something you need to be doing?

And then the availability of talent, obviously. Make sure you're keeping your good team members, or at least keeping them around in some way. We just spent the last decade scratching and clawing to find good people, and then we trained them, so they got all this institutional knowledge in their head and their heart. And if we have to let them go for some reason, lay them off or furlough them, we got to make sure we stay in touch with them because we're going to want those people back. There will be some that we don't, and there are going to be, already are amazing people available. So my suggestion is don't stop interviewing. Even if you don't have positions that are available right now, make sure you're in the market and make sure you have ads running, make sure that people are doing interviews with you, make sure that you're talking to the potential candidates for future jobs that might be inside of your organizations because you need to do that when there's a big pool, because when there's not a big pool, again, you remember how difficult that is.

And then trainings and certifications. This is right around up your alleys from an association standpoint. There is no time like now to do training and certifications. We've all been busy over the last decade, and training people on anything is something that always got pushback. It wasn't for budgetary reasons, it was strictly for time. Nobody had any time to do training and certainly not to get new certifications on anything. Well, guess what? They have time now. Some of them where business has gone down, people are at home, some of them are furloughed.

I had a medical company I was talking to last week that did layoffs, and then they've segmented their team about with who they're going to bring back, and they're pushing education out to the team right now who they're not paying, they're on unemployment, and they're just waiting for them to take all of that training so that they can be ready to come back. It's just education for them, and then they'll choose the ones that they want to bring back from that. Think about trainings and certifications because there won't be time for that once the upturn gets here.

And then projects you've always dreamed of. I talked a little bit about this earlier, but think about those things that you said, "Wow, wouldn't it be great if we did this, or wow, it wouldn't be great if we had this." Lots of people have time right now. Talent is everywhere. People are laid off. Could you get projects done for less? Absolutely. And you're only going to need to be ready for the upturn.

So always set a goal, always make a plan, and then go do the work. So those tools that I showed you in the beginning of this webinar lead us to these tools, which are, what are we going to do? What's the plan and the work look like? So we've got a short term, 30, 60, 90 day priority sheet, as well as a company working priority sheet. So you take each one of those priorities and you can break them down task by task by task. Pretty self explanatory, but it has instructions on it. Again, just tools that you can take and use with your teams.

So change is inevitable, growth is certainly optional. Our website is here, petracoach.com. The COVID-19 section is right smack in the center, so all of our resources are going to be there. So to get your tools, so make sure you have these to put to use, as well as a PDF copy of the latest book that I wrote called Vitamin B (For Business), you're just going to go to petracoach.com/the-vault, T-H-E-hyphen-V-A-U-L-T. When you get to petracoach.com/the-vault, you put some information in and you're going to find this. So you're going to see all the tools are downloadable for you and there are two workshops that are there for you as well. So as an association, you're more than welcome to attend either one of these or both, and then we can also offer this to your members, so using the tools over a four-hour period with coaches. And if you use this code, PETRASTRONG, normally this workshop's \$297, so almost \$300, if you use the code PETRASTRONG, you can enter and be a part of these workshops at no charge whatsoever.

So when you get to the Petra vault, you're going to see a link up here where we can do a co-branded webinar. So if you're interested in having us do this webinar or one like it for any of your members, let us know. You can just set this branded webinar and we'll give them access to the tools, we'll do a workshop directly for them so they can work through these tools with the output being they're better suited for what's going on right now. So again, it'll take you through our website, you're just going to fill out this little information set, and we'll get back to you as quickly as we can. So remember, code for the workshops are PETRASTRONG, and you can do those at no charge.

Here's my contact information. I'll leave that up there for just a second. If I can do anything for you, please let me know. That's a lot of information in about 48 minutes, a lot of stuff to think about. I just want you to remember defense, stabilization, reset and offense, and you've got to move through those quickly, defense to offense, and always look to play more defense as you go. Hopefully I've been able to help with a few thoughts and ideas. If I can

do anything, again, reach out to me via email or you've got my cell phone number right there. Take care.