



# INVESTING IN HUMAN CAPITAL

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*BUILDING A BETTER ORGANIZATION  
ONE EMPLOYEE AT A TIME*

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## Many ways to invest ...

Expand by Acquisition

Remodel Facilities

Upgrade Equipment

Marketing

Branding: Logo/Colors

Advertising Campaign

**Invest in People!**

I've found that there are a variety of ways to improve your businesses and I've engaged in them all. You can expand your reach and market share by Acquiring a competitor. You can improve your current facilities, adding better reception spaces, restrooms, ADA. You can buy a new coach, Limo, backhoe, or tent.

You can launch a new marketing campaign or refresh your brand.

These all have their place under the sun. They all help in one way or another. And, you should consider them all. But I must admit, if I had to prioritize the list, the most important investment I can make is in People

What business are you in?

What aspect of your business  
do you value most?

A: Death Care, Sales, Service, Cemetery, Funeral, Land development, etc

I am in a business that serves the broken hearted and promises to care for them, and their loved one, now and forever.

The answer to this question should shape your behavior and decisions regarding who you hire and what they do.

Your Facilities?

Your Customers?

Your Employees?

Another way to ask this questions is....

What would you regret most if it were lost or damaged?

## Reputation

Years to build it, days to kill it.

How is yours?

How was/is it built?

Who is in charge of it?

Your reputation rests with them!

“People are your most important assets.”

**NO!**

People are your greatest liability!  
Only the “right” people are your assets.

## Risk Management

Each employee carries a risk factor

It's quantifiable

What is your level of risk tolerance?

Mitigation:

- Selection Process

- Training

- Education

Hierarchy = Higher risk

## Same: Not Equal

Every employee is important to your business

1<sup>st</sup> Line Supervisors are *Keystones*

**Key-stone:** *noun* \ˈkē-ˌstōn\ :

- A large stone at the top of an arch that locks the other stones in place
- Something on which other things depend for support



Every employee  
deserves a good boss!

## Mitigating Risk

### Training & Education

- Tasks and Responsibilities
- Continuous Process Improvement
- Personal Development

### Some things can't be taught

- Personality
- Work ethic
- Emotional Intelligence

### Most Improved vs. MVP

*"Get the right people on the bus"*

--  
-Jim Collins



Three events that signal the greatest opportunity to improve...

When an employee...

Quits

Dies

Gets Fired

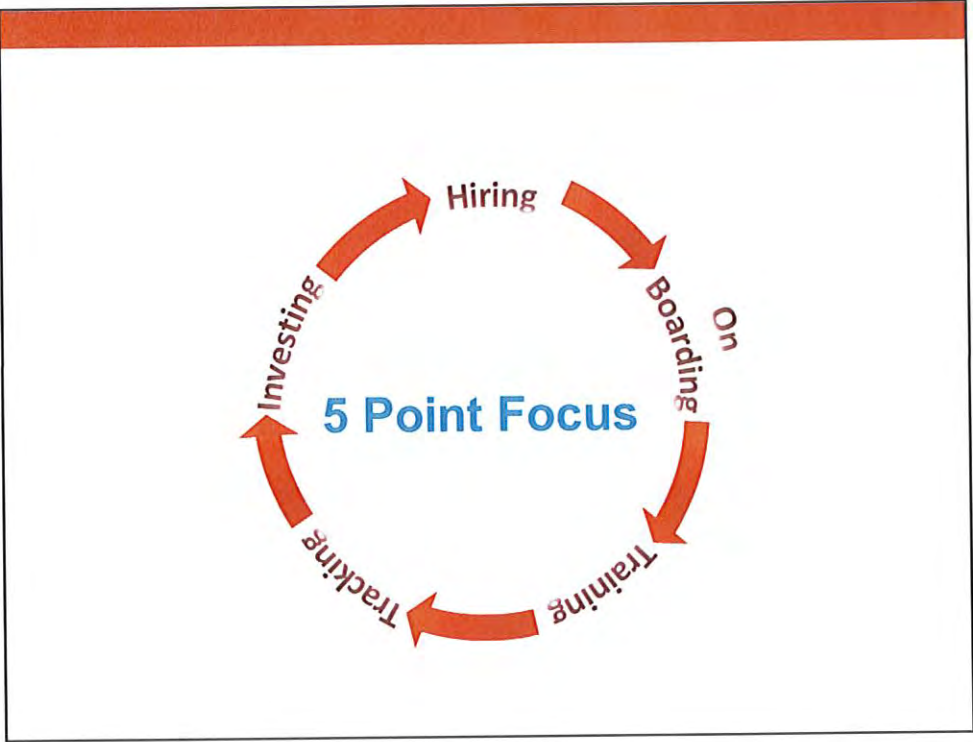
*“Businesses never get better... People do!”*

*-Gary O'Sullivan*

You only improve a service organization by:

- Making people better
- Getting better people
- Setting Standards of Performance
  - Best employee = minimum competency

Patience: Virtue & Curse



## Hiring

*#1 Rule:* You NEVER fill a position...  
You acquire talent!

What do you need?  
Where do you look?  
How do you ask?

## What do I need?

Job Assessment  
Job Description/Title  
Salary Review

## Where do you look?

- Inside or Outside
  - Organization
  - Profession/Industry
- On-line vs. Print
  - Career builder, Monster, Jobvite, LinkedIn, GlassDoor, etc.
- Passive or Active
  - Employee Referrals
  - Community Colleges
  - Head hunters/Recruiters
  - Temp Agencies
  - Job Fairs
  - Licensee mailing lists
  - Signing bonuses

Death care industry? Really: 942 vs. 38 4%

Experience? Retail, Customer Service, Give me a great waiter! On their feet, conversant, multitasking, engaged.

8 years serving families

3 years as a Bellman/waiter at Ritz Carlton

High Touch/Low Tech

## How do you ask?

### Ad Copy:

Aspirational?

Inspirational?

Selling yourself or enticing them?

### Visuals:

Sexy, Smart, Successful

**SUPERVISOR**  
**Flower Shop**  
 Well-established co. seeks ind. w/xlnt leadership skills to oversee the Flower Shop dept. Req'd: knowledge of all aspects of flower shop operations incl. ordering supplies & staffing; prev. supv exp & xlnt written & verbal comm. skills. We offer competitive sal. & xlnt bnfts!  
 Send resume w/sal. history to PO Box 250219 Glendale, CA 91205 or fax to 323-551-5068 EOE



**A UNIQUE OPPORTUNITY FOR A UNIQUE INDIVIDUAL**

Forest Lawn is seeking dynamic sales professionals who can reach out and develop relationships with families in their communities, and explain to them the many advantages of paying for their funeral, cremation, or cemetery costs in advance. You could earn \$75,000 or more in the first year. So don't wait. Apply today.

**BENEFITS**

- Extremely Generous Commission
- Robust Lead Support System
- 16 Weeks of Paid Training
- Bonuses and Trip Incentives
- Work When and Where You Want
- Laptop, Cell Phone, and Printer
- Matching 401(k) Contributions
- Medical, Dental, and Life Insurance

**REQUIREMENTS**

- Motivated and Results-Oriented
- Good Communication Skills
- Professional and Ethical
- Self-Starter
- Able to Network Easily
- CA Driver's License and Reliable Car
- Sales Experience is a Plus
- Ethical is a Plus

Apply at [FLSalesCareers.com](http://FLSalesCareers.com) or call us at 323-340-4575

**FOREST LAWN®**

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GLENDALE • BUCKLEWOOD HILLS • CONDRA HILLS • CYPRESS • LONG BEACH  
 CITY OF INDUSTRY • CATHEDRAL CITY • COACHELLA • INDO • PALM SPRINGS



But I just need a guy to... mow!

- Customer Service Experience
- Team Dynamics
- Potential for Leadership Roles

You never JUST need a guy to mow!

Gut check time!

## Screening

- Applications
  - Employment History
    - Reason for leaving
    - Gaps
    - “See Resume”
    - Neatness
- Resumes
  - Cover letters
    - Focused vs. General
  - Accomplishments



- Trocarman@Yahoo.com
- PPLPKLR@gmail.com
- Voicemail Greetings

## The Interview...

3 interview minimum

- Solo(s)
- Panel
- Food

Do NOT rush / settle

Date until you fall in love!

## After the rose...

Background Screening

Drug Tests

Medical Evaluations/Physicals

Psychological Evaluations

## On-Boarding

What are you trying to accomplish?

Culture vs. Task

Basic Info + Setting the "Tone"

*Values, Purpose, Mission, Vision*

Who does it?

First Impressions...

What's covered?

How long does it last?

## New Employee Orientation

### Day 1

8:00 am: Welcome/Intro's  
8:30 am: "Uniquely a Leader"  
9:30 am: Team Link Philosophy (SVP)  
10:00 am: Meal/Rest/Time enrollment  
10:25 am: Rest Break  
10:35 am: 17 Points of Service  
11:35 am: New Hire Paperwork  
12:00 pm: Meal Break  
1:00 pm: Tour of Park  
3:30 pm: Rest Break  
3:40 pm: Benefits Presentation  
5:00 pm: End of Day

### Day 2

8:00 am: Opening Discussion  
8:30 am: DVD: "Serving All Faiths"  
9:00 am: Grief & Faith Training  
10:15 am: Rest Break  
10:25 am: Safety is #1 Priority  
10:55 am: Harassment Prev. & Email  
11:25 am: Handbook Overview\*/Dress  
Code/Orientation/Tips  
12:00 pm: Meal Break  
1:00 pm: Planning Center/Photos  
2:00 pm: Benefits and Resources  
3:00 pm: Rest Break  
3:10 pm: What to expect tomorrow...  
3:40 pm: Benefits Follow-up

## New Hire Training

### Formalize the Process

#### New Hire Check List

Introductions

Schedules

Work flow

#### Weekly Training Plan

Task Assignments

Responsibilities

Expectations

#### Documented Procedures

## Tracking

30- Day Review

90- Day Review

180-Day Review (Fish/Cut Bait)

On-Going Performance Assessments

PREP/PPC/PIP

Six Month Intervals

Goal Setting: Areas of Focus/Improvement

Meritocracy in Compensation



## Employee Investment Decisions

### Money

Salaries

Benefits

Medical/Dental/Retirement

Equipment/Uniforms

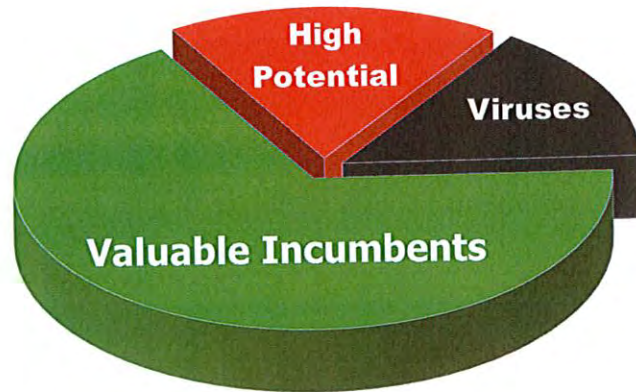
Training

Where do you invest your time?



# Employee Issues

### 3 Employee Types



### Valuable Incumbents

- Reliable, Consistent, Follow rules, Work well with others, Experienced

### High Potential

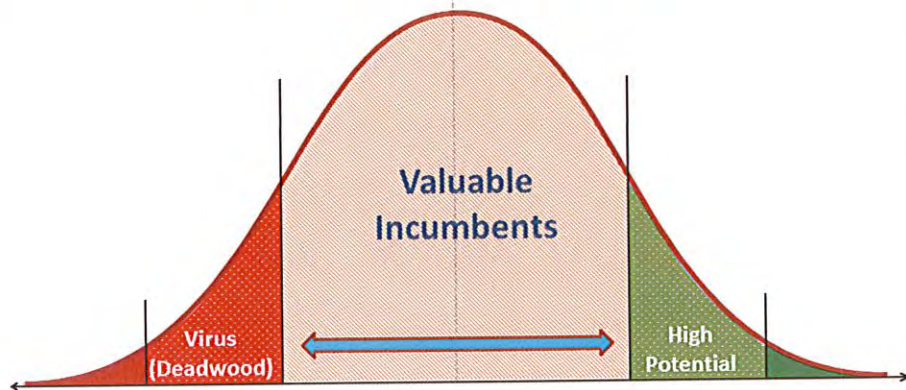
- Surprisingly competent, Trustworthy, Self-motivated, Exceeds expectations, Leaders, Live your Culture

### Viruses (*“Dead Wood”*)

- Negative attitude, Minimum Contribution, Unmotivated, Unhelpful, Antagonistic, Fight change, Lazy, Rude

In which group do you invest the most time?

## Employee Distribution



## Investment Strategies for Valuable Incumbents

### Regular “Feeding and Watering”

Solid Diet of Training

Customer Service

Process improvement

Technical Skills

Set Standards and Expectations

Acknowledge & Reward Performance

Act on Suboptimum-Performers

Prevent “dead wood” from occurring

## Dead Wood

"Were they dead wood when you hired them, or did they become that way working for you?"

*-Peter Drucker*

*"He's a nice fellow, but..."*

*"She's good at \_\_\_\_\_, but never seems to..."*

*"He's fine, as long as you don't mind..."*

*"Bless her heart"*

**Stop accepting mediocrity!**

Dead wood left untreated becomes a virus

## Personal Improvement Plan (PIP)

1. Set expectations
2. Describe in detail the change you want to see
3. Establish a time line
4. Put it in writing
5. "Last chance" agreement
6. Thank and excuse!



## Investment Advice for High Potentials

Stop taking them for granted!

Treat them differently

Set higher standards/expectation

....then PUSH THEM HARDER!

Give them Special Assignments/Responsibility

Invest in their education

Hold them up as examples

Surprise them!

Build a "Culture of Accomplishment"

## Investing in Employees

It's not a distraction from your business

It **IS** your business

Finding talent is hard work

Training Programs are important

Nothing makes a greater impact on culture  
than firing a non-performer and hiring a  
"new" standard

Build a "Culture of Accomplishment"



Who is your most difficult employee to manage?

You!

## You have work to do...

1. Feed and water your Valuable Incumbents
2. Stretch, reward, and invest in your High Potentials
3. Cut out your Dead Wood and Viruses
4. Hire your replacement

Your reputation will thank you!



Thanks

## Employee Distribution

Figure 3.3: Spread in a Normal Distribution

