



# **Optimizing Best Practices for Managing Yourself and Clients**

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# Agenda

**I. Introduction**

**II. Core Values Index – what it means, how we operate and alignment of Core Values**

**I. Performance - of yourself, teams and clients**

**IV. ROI Worksheet – numbers, opportunity and value**



## Universal Mission

We come into this world with just three things:

Some unknown quantity  
What we are  
of Time

**Each of us has a unique recipe  
of core values**



**We are warped away from  
acting purely in alignment  
with our core values by our  
parents and environment.**



**When a person's daily tasks do not align with their Core Values, they are likely to...**

**...fail**

**...redesign the position**

**...disrupt**

**...leave**

**Many do all of these things!**



## Core Values Index Key



### Core Values Index Key

<p style="text-align: center; font-weight: bold; font-size: 1.2em;">Builder</p> <p><b>CORE VALUE</b> <b>Power</b> Supported by <b>Faith</b></p> <p>(Personal energy applied to make a positive difference) (I know what to do now; I will know what to do next)</p> <p><b>Contributions to Team</b>      <b>Conflict Strategy</b></p> <p>Action Results                      Intimidate</p> <p><b>Learning Styles</b> Decide and Do</p>	<p style="text-align: center; font-weight: bold; font-size: 1.2em;">Merchant</p> <p><b>CORE VALUE</b> <b>Love</b> Supported by <b>Truth</b></p> <p>(The nurturing of core values in one's self and in others) (The way things are)</p> <p><b>Contributions to Team</b>      <b>Conflict Strategy</b></p> <p>Relationships Vision                      Manipulate</p> <p><b>Learning Styles</b> Talk and Listen</p>
<p style="text-align: center; font-weight: bold; font-size: 1.2em;">Banker</p> <p><b>CORE VALUE</b> <b>Knowledge</b> Supported by <b>Justice</b></p> <p>(The how and why of things) (Knowledge is available to all and used appropriately)</p> <p><b>Contributions to Team</b>      <b>Conflict Strategy</b></p> <p>Conservation Information                      Aloof Judgment</p> <p><b>Learning Styles</b> Read and Analyze</p>	<p style="text-align: center; font-weight: bold; font-size: 1.2em;">Innovator</p> <p><b>CORE VALUE</b> <b>Wisdom</b> Supported by <b>Compassion</b></p> <p>(To see the way things are and know what to do about it) (To remain inquisitive and observant, seeing and understanding)</p> <p><b>Contributions to Team</b>      <b>Conflict Strategy</b></p> <p>Assessment Solutions                      Interrogate</p> <p><b>Learning Styles</b> Assess and Solve</p>

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## Your Unique Core Values Nature and How you Operate When Your Score is Between:

36 ↓ 26	Almost always
25 ↓ 19	Ordinary and Regular Energizing
18 ↓ 12	Occasionally with Effort
11 ↓ 1	Almost never De-motivating

**26-36** you almost always operate in alignment with that *core value*.

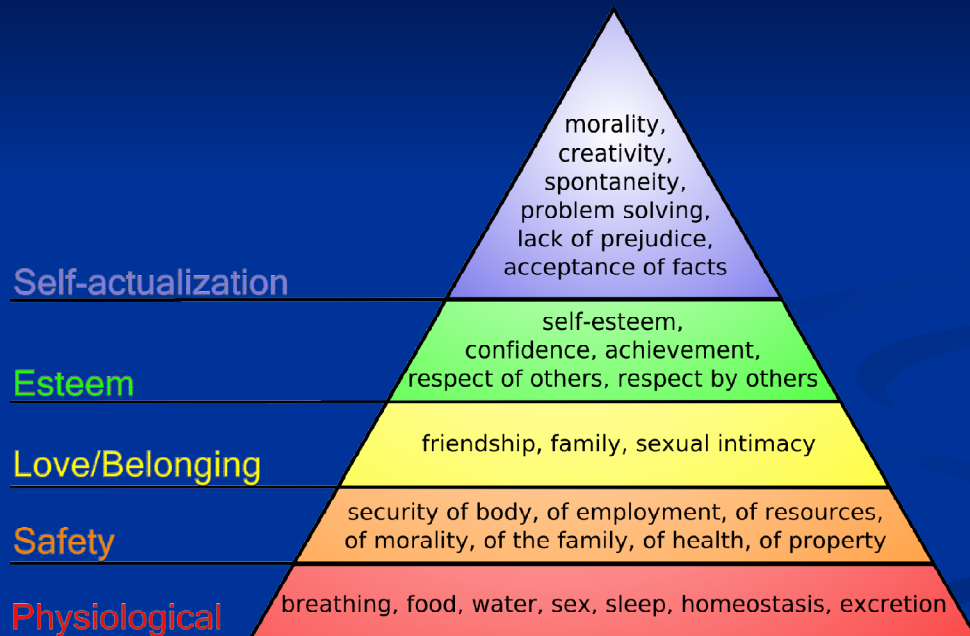
**19-25** you will ordinarily and regularly operate in line with that *core value*, and you will find it energizing.

**12-18** you will occasionally and with effort operate in line with that *core value*.

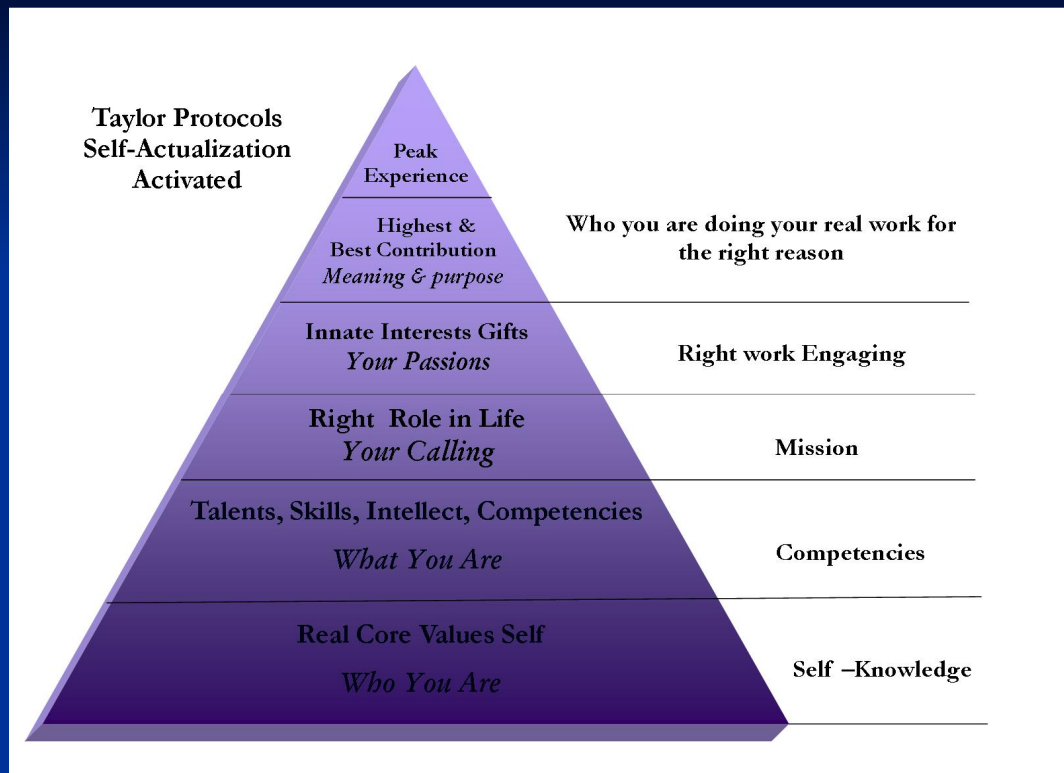
**1-11** you will almost never operate in line with that *core value* and you will find it de-motivating.



# Maslow's Hierarchy of Needs

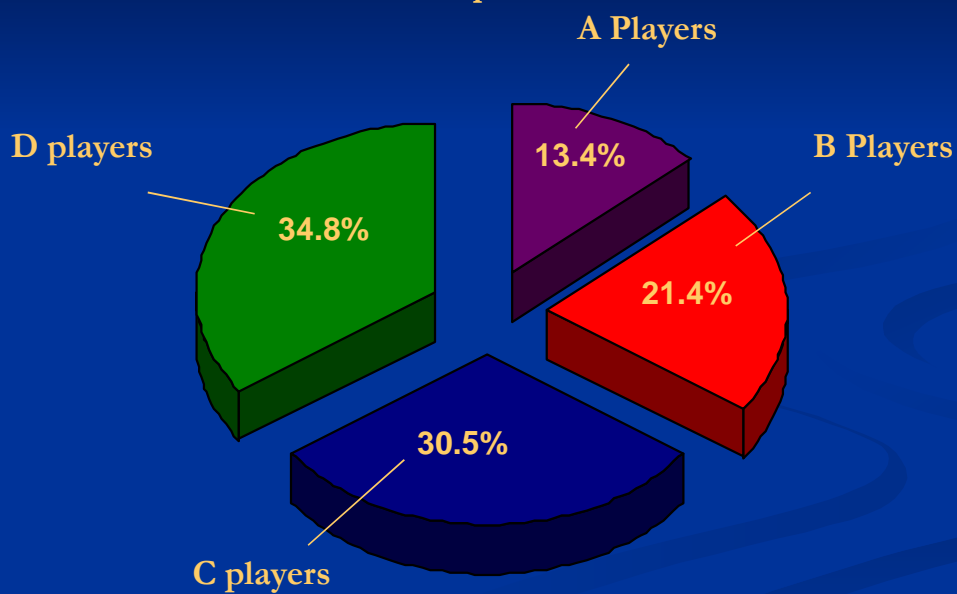


# Taylor Protocols Self-Actualization



## The Resulting Performance for Known Hiring Practices

In over 500 companies, no matter what their hiring practices entailed, we've found that this is the break-down in performance through the typical hiring process in any given position.



## Explanation of the next slide (13)

- The next slide is an example of the ROI of Human Capital in a given position and what A and B performers produce vs. C and D performers.
- If you look at the Position Revenue less the Compensation, you can see that the Net Revenue of a given position can be greatly enhanced by making the right decisions.
- We are often able to double the amount of A and B performers and reduce the C and D performers by half, simply by finding and bringing in more Top Performers who have similar Core Values to existing A and B performers.
- Most of the turnover in a company typically occurs in the C and D performers, which puts a tremendous strain on resources (time, money, training, etc.) and impacts the effectiveness of a team.
- There is a significant opportunity and value in aligning the right people in the right seat, for optimal production of a team.



**Automated Employment Prescreening System - ROI Model**

**Position Revenue**

Rank	# of employees in Position	Monthly Revenue per Employee	Total Monthly Revenue	Annual Revenue of All Employees
A	10	\$100,000	\$1,000,000	\$12,000,000
B	15	\$75,000	\$1,125,000	\$13,500,000
C	50	\$40,000	\$2,000,000	\$24,000,000
D	25	\$15,000	\$375,000	\$4,500,000
<b>Total</b>	<b>100</b>		<b>\$4,500,000</b>	<b>\$54,000,000</b>

**Position Compensation**

Rank	# of employees in Position	Monthly Compensation per Employee	Total Monthly Compensation	Annual Compensation of All Employees
A	10	\$5,000	\$50,000	\$600,000
B	15	\$4,500	\$67,500	\$810,000
C	50	\$4,000	\$200,000	\$2,400,000
D	25	\$3,000	\$75,000	\$900,000
<b>Total</b>	<b>100</b>		<b>\$392,500</b>	<b>\$4,710,000</b>

**Position Net Revenue**

Rank	# of employees in Position	Monthly Net Revenue Per Employee	Total Monthly Net Revenue	Annual Net Revenue of All Employees
A	10	\$95,000	\$950,000	\$11,400,000
B	15	\$70,500	\$1,057,500	\$12,690,000
C	50	\$36,000	\$1,800,000	\$21,600,000
D	25	\$12,000	\$300,000	\$3,600,000
<b>Total</b>	<b>100</b>		<b>\$4,107,500</b>	<b>\$49,290,000</b>

**Position Turnover**

Rank	# of employees in Position	% Turnover	Cost of Turnover per Employee	Total Cost of Turnover
A	10	5%	\$30,000	\$15,000
B	15	8%	\$30,000	\$36,000
C	50	25%	\$20,000	\$250,000
D	25	60%	\$20,000	\$300,000
<b>Total</b>	<b>100</b>	<b>29%</b>		<b>\$601,000</b>

**ROI Potential of Restructured Position**

**Position Revenue - Double of A's & B's and 50% reduction of C's & D**

Rank	# of employees in Position	Monthly Revenue per Employee	Total Monthly Revenue	Annual Revenue of All Employees
A	20	\$100,000	\$2,000,000	\$24,000,000
B	30	\$75,000	\$2,250,000	\$27,000,000
C	25	\$40,000	\$1,000,000	\$12,000,000
D	12.5	\$15,000	\$187,500	\$2,250,000
<b>Total</b>	<b>88</b>		<b>\$5,437,500</b>	<b>\$65,250,000</b>

**Position Compensation**

Rank	# of employees in Position	Monthly Compensation per Employee	Total Monthly Compensation	Annual Compensation of All Employees
A	20	\$5,000	\$100,000	\$1,200,000
B	30	\$4,500	\$135,000	\$1,620,000
C	25	\$4,000	\$100,000	\$1,200,000
D	12.5	\$3,000	\$37,500	\$450,000
<b>Total</b>	<b>87.5</b>		<b>\$372,500</b>	<b>\$4,470,000</b>

**Position Net Revenue**

Rank	# of employees in Position	Monthly Net Revenue Per Employee	Total Monthly Net Revenue	Annual Net Revenue of All Employees
A	20	\$95,000	\$1,900,000	\$22,800,000
B	30	\$70,500	\$2,115,000	\$25,380,000
C	25	\$36,000	\$900,000	\$10,800,000
D	12.5	\$12,000	\$150,000	\$1,800,000
<b>Total</b>	<b>87.5</b>		<b>\$5,065,000</b>	<b>\$60,780,000</b>

**Decrease in Turnover Costs from Restructured Position**

Current Turnover	50% reduction in Turnover	Average Cost of Turnover	Turnover Cost Savings
29.2	14.6	\$25,000	\$365,000

**Increase in ROI from Restructured Position  
Double of A's & B's and 50% reduction of C's & D's**

# of employees in Position	Increase in Total Monthly Net Revenue	Increase in Annual Net Revenue	Gross ROI - Revenue and Cost Savings
87.5	\$957,500	\$11,490,000	\$11,855,000

## Core Values Index and 80/20 Protocol Longitudinal Field Validation Study 2001-2004

Business	# Pos.	# Emp.	"A" Performers		Percent	"D" Performers		Percent	One Year	Increase	
	Profiled	#Profiled	Start	End	Increase	Start	End	Decrease	Sales	Profits	
										Beginning	End
Call Center	1	265	14	57	307%	147	15	90%	33%	N/A	N/A
Transmission Dist.	1	10	2	5	150%	2	0	100%	2%	<1%	8%
Pipe/Wire Dist.	2	32	4	10	150%	5	0	100%	7%	2%	9%
Ntl. Financial	1	33	2	21	343%	5	3	88%	420%	<1%	15%
Wood Products	2	23	4	9	125%	5	2	60%	80%	<1%	18%
HVAC Services	2	37	5	13	160%	6	2	67%	91%	<1%	20%
Transport Co.	7	27	4	23	475%	8	1	88%	89%	1%	8%
Wood Products	4	256	15	54	260%	53	9	83%	22%	1.5%	18%
Boat Builder	2	57	8	20	150%	15	4	73%	112%	4%	7%
Software Services	1	28	3	5	67%	2	1	50%	20%	<1%	8%
Image Processing	1	18	2	5	150%	5	1	80%	35%	<1%	17%
Metals Machining	1	19	3	7	133%	4	0	100%	63%	<1%	17%
Sign Mkr	1	16	4	7	75%	3	0	100%	5%	2%	4%
Trucking Company	1	46	7	14	100%	11	2	82%	40%	<1%	3%
Promo-Materials	1	13	1	3	200%	2	0	100%	70%	<1%	8%
Engineering Co.	1	17	2	3	50%	3	2	33%	45%	N/A	16%
<b>Totals</b>	<b>29</b>	<b>897</b>	<b>80</b>	<b>256</b>	<b>220%</b>	<b>276</b>	<b>42</b>	<b>85%</b>	<b>71%</b>	<b>1%</b>	<b>12%</b>

You can see by increasing the amount of A & B performers and decreasing the C & D performers in a given position and company, the impact can be tremendous.



*“The most powerful business  
tool I have ever found.”*

Chuck Orton, President, MacDonald Miller Residential





**Putting every person in the right seat,  
doing the right work.**

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