



DRAFT 03-01-2023



Guiding Principals for Managing Organizations

Online, In Person, And Everything in Between

James O'Flanagan

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Rev. 0

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Summary

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The Guiding Principals of O'Flanagan All-Purpose and OAPSIE.COM

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- All employees shall be kind at all times. No exceptions.
- We are all writers
- Our leaders are servant leaders. Our jobs are to make sure the creative staff have what they need to do their job
- We are all writers
- No Bullying. Period.
- Please try to follow the company management/organizing principals as best as you can
- Servant Leadership

Servant Leadership

- What is Servant Leadership?
- Fullfill company mission statementI see my job as twofold
 - Provide my employees with all they need to accomplish their jobs
 - Clear goals and expectations
- https://en.wikipedia.org/wiki/Servant_leadership

Servant Leadership 2

- Servant leadership is a leadership philosophy in which the goal of the leader is to serve. This is different from traditional leadership where the leader's main focus is the thriving of their company or organization. A servant leader shares power, puts the needs of the employees first and helps people develop and perform as highly as possible.[1] Instead of the people working to serve the leader, the leader exists to serve the people.[2] As stated by its founder, Robert K. Greenleaf, a Servant Leader should be focused on, "Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants?"[3]

We are All Writers

- Our Primary job is to write



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- Write at least one sentence in the PM software. It is the last 15 minutes of your day.

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Organizing Principals

- Employees should want to come to work
- No Bullying of any kind tolerated

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No Bullying

- Define bullying



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Physical Offices & Remote Work

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Focus on outputs rather than inputs



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Onsite Expectations

- There are no set in stone expectaations to be at the company headquarters.
- Employees are expected however to be available for onsite meetings, at the company's request, or the employee's request
- 4 weeks notice to be given all employees for travel time
- Each manager is allocated a travel/meeting budget. Use it wisely. No exceptions.

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A Trading Floor is Just A Cube Farm With A Stock Ticker

- One example of a factory office masquerading as productivity is the ubiquitous bank trading floor.
- On a trading floor at a bank, no actual trading takes place.

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The work library vs work hq

- Project goals
- Align those with company values
- set



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Pimp Out Your Office

- Make it nice!



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Views for Online Work



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- The shared experience is missing. No common frame of reference with tv and stuff and football and baseball. Hard to commonize

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- I had to prove to myself I could work in a different more deliberate way. It keeps the anxiety at bay to focus on process rather than result.

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- If you don't know the exact wording of the thought you want, just start writing.
- Don't worry about grammar, punctuation, word count. That can all be fixed later.
- The important thing is to allow your brain to “free think” without judgement or restriction.
- Most especially: Try not to judge yourself for your thoughts. Your brain has an amazing innate ability to make connections on its own without conscious thought
- This is called “Flow”

Documentation

- Block aside time for this
- Everyone should be spending 30 minutes per day, plus a 1 hour per week summary

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- Initial anxiety reaction



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- You need an 8 hour editing session in order comprehend the entire document.
- Block off enough time for it.

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- Define your puzzle pieces, then assemble
- The experiment with re-assembling in new ways. This is a good process for innovation

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Make plan for collaboration software
which software?



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AI is physho history



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Mission Statement

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Have a Mission Statement, Follow a Mission Statement, Check The Mission Statement

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A

- All Individual Business Plans Should be entirely derivative from the company's mission statement
- Any other business activity not on your business plan is discouraged
- Even free thinking periods should be done methodically, as if in a library

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- Follow the plan, know the plan, check in with the plan, re-evaluate the plan, change the plan, but only if necessary, and only if this test has been made:
 - Is it a HI impact decision, or a LO impact decision

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- The No A-Hole Rule
- What is an A-Hole?
 - Simply put, it is someone you don't want to spend time with for an extended period.

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- That tech should drive software sales and post impressions from zero to. Some upper limit goal

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Have a Regular Planning Period

- This helps those be pro active who might otherwise not have a propensity to do so

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- Industry standards for all hires



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- Develop the skill to express yourself over time. Continuously improve, and this includes your skills, goals, and self

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- Re evaluation of methods means all business decisions need to be written

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- We are hiring a company of writers
- We are all writers first, technical people second.

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- Industry standards for all hires



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- End product of an engineer? A stack of paper. Work backwards from that.

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- Incentivize employee with stock
- Why do this?
- It locks them in
- It aligns their incentives with the company
 - They are not only working for their jobs
 - In essence, you are giving employees a say in how retained earnings are used in the business
- Standard ESOP for all employees
- All executive compensation must be approved by the board of directors



- My background is in management



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- One of my superpowers is my rumination. My achilles' heal is also my rumination.

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Jim's Background

- Education
 - BS, Computer Engineering, CWRU
 - MS, Engineering Management
 - Engineering Management =
 - (1) MS in Mechanical Engineering
 - -- PLUS --
 - (1/2) Master of Business Administration
 - Master's Report: Outsourcing at Large U.S. Industrial Companies; Sound or Unsound?

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Planning & Time Allocation

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Publish your schedule, stick to it

- Office hours where you need people available live
- Each employee should post and stick to their “usual hours”
- This works because the usual hours time block is only 4 hours.

- We are asking employees to block out 3 hours per day
- Technical review meetings, as needed
- Employee training

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Core Hours

- What are core hours?



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- when you think you have the timeline figured out, go back and add 20 percent. You have not added enough time. It is very important we get this judged accurately because budget forecasts are based on the time

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- If I say your dead name, and/or use the incorrect pronoun, please let me offer my apologies up front. I am sorry for not addressing you correctly.
 - The reason I am saying this is because I am an old fart
 - Like learning a new language late in life, it is not second nature to an old fart like me
 - It makes me feel good that people are able to express themselves.
 - I admire anyone who is able to step forward with courage and say who they are
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- My goal is to be able to address people according to their correct gender identity



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Communications

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- Answer all Teams messages as soon as possible, during work hours
- Try to answer all emails within 8 hours (1 business day)
- Answer all voicemails, return all calls within 8 hours
 - The exception to this rule is the front facing teams.
 - In order to make up for this, we need to _____
- Do not send an email if it can be sent via slack.
- All company business to be conducted online via Slack. No exceptions.
 - This includes mobile communication, written, verbal, or otherwise.
 - All off-channel communication modes are strictly forbidden
- You will communicate with your employees via approved channels, at approved times, and with the expectation of reply appropriate to the mode of communication



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Positive language



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No Profanity

- This includes yelling or otherwise raising your voice.
- This includes both verbal and written communication

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Use The “Bearhug” Approach to Negotiation

- Mention Henry Kravis



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Conduct Meaningful Employee Experience Surveys

- Like/Dislike Yes/No questions are great
- They are trackable, searchable, data-able
- Think of how much data Netflix is able to glean from Like/Dislike, or Facebook

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Active listening



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- Positive language vs. negative language.
- This is not saying things need to be peaches and cream
- It does mean that all else being equal, you WILL do the following:
 - Assume your co-worker is telling you the truth
 - Actively listen
 - Respond affirmatively or negatively, or postpone the decision, but you will respect your co-worker and follow up on it.

Schedule Send on Emails

- Email only once a day
- Schedule all of your emails to be sent at 8 pm EST.
- This promotes asynchronicity
- This disallows managers to demand immediate responses

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- Use The Schedule Send Button on All Emails
- Do not send emails past 8 pm.
 - The 1 exception to this is the front facing sales teams
 - They will be compensated for this difference in another way. The way is ____
 - This will be
 - You get 5 exceptions to this rule PER YEAR.
- Scheduling send your emails is more kind

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The Say And Repeat Communication Strategy

- A familiar adage for presentation, “Tell them what you’re going to say, say it, tell them what you just said.”
- The

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Communication

- Associates are expected to be “at-the-ready” during core work hours
- Core Work Hours – 9:30 am EDT/EST to 1:30 pm EDT/EST

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No Verbal Decision Conversations

- Adfads
- This can change if MS or some other company comes up with instant transcription and indexing services of all verbal conversations

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No Silos

- What is a Silo?



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Open & Singular Communication Channels

- All associates from the CEO to the rest of the company, shall conduct company business on company approved channels.
- This applies to all texts, calls, emails, VM's, DM's, or any other method.
- Slack can handle all of these.
- If it's about work, or during work hours, you probably need to be talking on a Slack channel

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Free Writing

- What is free writing?
- Do we need free writing periods?
- Why do we all need to be writers, no matter our profession?
- Working asynchronously like this

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- In the writing process, at some point, you're going to feel like. "I've said everything I need to say about that."
- Do not quit writing until you've hit that point.
- Then go back and start editing.

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The Writing Sample

- Use as a hiring tool
- It also function as onboarding
- It also functions as applied work, because you can outsource some of your own during the interview process

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The Free Writing Style

- Stream-of-consciousness
- But not really



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Technical Document Writing

The “Outside-In” Method

- What is the Outside-In Method?

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- Build the document up
- Write the “Front” section last
- A document consists of a front section and several appendices

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Our Title Say Whatever, But We Are All Storytellers.

- No More, No Less.



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Management Software

- Slack
- Smartsheet
- Microsoft Office
 - Excel, Access, Powerpoint, Word



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Minimum IT Provided By Company



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Technology

- Clockify for reporting time
- Smartsheet for all projects, no matter how small

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Summary

- Experience
- Knowledge
- Achievement
- Technicality
- Patience
- Kindness
- Respect
- Empathy
- Teamwork

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Experience



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Knowledge



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Achievement



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Technical



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Patience



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Kindness



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Respect



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Empathy



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Teamwork



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Attendance & Hours Worked

- All associates are expected to work an 8 hour day. No more, no less.
- Associates are expected to maintain core hours unless on approved vacation, have called in sick properly (procedure available)
- Excessive missed unexcused core hour days, online meetings, or in person meetings shall be addressed by the manager on a case by case basis
- All employees are to maintain online core work communication hours of 10 am EDT (year round) to 2 pm EDT (year round).

- At the intersection of computation and mechanics

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Holidays

- All National Specific, Traditional Specific, Religious Specific Holidays are to be taken from a common pool allocation
- Each employee is provided with 15? HOLIDAY days
- Yearly election
- To be done with benefits election
- Manager to have NO INPUT into this benefit election
- This is done to be respectful of all cultures. It is recognized that not all circumstances can be foreseen, so this
- You can either choose to share what holiday you are celebrating, or not at all.
- Examples include:
 - Pride Day
 - Left Handed Day

What are Core Hours?

- Core Hours defined



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Onboarding

- A generic onboarding template is provided in this guide.
- Managers are expected to adapt the template to their specific teams needs, with their manager's annual approval

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Gender Identity & Pronouns

- OAPSIE fully supports everyone's right to be treated kindly.
- This includes respecting everyone's wishes on their gender identity, gender preference, sexual identity, sexual preference, or any other combination possible.

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The Interview Process

- Initial screening
- Get a writing sample!
- Send 2 or 3 sample problems from your current work assignment.
- Draft problem statements
- We do this to efficiently use the time we spend on recruiting to also get some applied work done

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The Two Question Writing Sample



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Career Planning Discussion

- What do you want/need out of this job?
- What are my expectations of you out of this job?
- On average, we have people for three years. What are we going to do with them?

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Work Within Your Circle of Competence

- Or stretch “just outside” of your circle
- Your career should be a constant widening of this circle
- This is the embodiment of growth mindset

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Training and Education

- First and foremost, when looking for a candidate who have demonstrated the skills and behaviors we are looking for in the workforce
- We expect all candidates to meet minimum .
- If a person is hired for a job that normally requires a degree, there will be a plan in place to get that degree

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Tuition Reimbursement

- This is a business focused
- It must be a business need.
- However, one business need is investment in our staff. Spending company dollars on an employee's education is a business goal unto itself that serves the larger mission statement

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Training / Education

- OAPSIE is committed to employee education
- Tuition reimbursement
- Has to make sense in a direct business context
- Need a degree to accomplish one of your goals on the mission statement?
- Plan for it, budget for it, present it to the committee for approval
- There should be a direct correlation between the classes taken and the product delivered.
- For example,

What is a Good Working Relationship?

- It is when two professional come together to accomplish a business goal
- Work at this company revolves around Working/Professional Relationships only
- Types of relationships:
 - Significant Other
- Going out to lunch is ok. On the company dime, for a company event, for a company purpose. There should
- Going out to a dinner is not ok



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Onsite Expectations



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What are Good Boundaries?

- All associates are expected to maintain appropriate professional boundaries with all other associates and their family members.
- For those that wish to socialize and make friends at work, don't worry, we will have specific (optional) events. We must respect their right and preference to come to an office to see their co-workers in person.
- For those that wish to maintain a strictly business relationships at work, don't worry, it's ok. It is ok because:
- It is against company policy for ANY manager to discriminate against anyone due to their work location. This applies to all business dealings.

Know Your Limitations, But Be Adaptable

- I was smart, I just have a learning disability. Called anxiety and depression. I've had it since the fifth grade.
- There must be a plan in place when straying from someone's job description

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- "I like problem solving." What does that mean? It means I like to take my time figuring shit out. Know thyself.

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- why should i spend my time (or your time) on ANYTHING you're not good at, or are unwilling to do. Presumably you are there because you want to be. I want you to be here. To do a job with the skills your were hired for.

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Gender Pronouns

- Every associate is to address every other associate according to the other's gender identification and preference.
- Employees will be given the chance to change these on their Slack Profile

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- OAPSIE is committing itself to hiring LGBTQ+ students and professional
- LGBTQ+ professionals are completely unrepresented at the companies I have worked for
- It was like that in school
- I suspect that other places are like that
- OAPSIE is committed to giving first preference to LGBTQ+ candidates in the hiring process.
- It's good for everyone. It's good for business.x



Equality, Inclusion, Diversity

- To be perfectly clear, on matters of equality, inclusion, and diversity,
- When making company decisions, please use the following guidelines:
 - On hiring decisions, when all else is equal, preference should be given to those with non-traditional
 - Gender expression, gender

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- everyone should be qualified for their jobs to industry standards of education and experience. Any exception to this rule must be approved by the board under exceptional circumstances.
- This prevents nepotism

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How To Do A Budget

- Estimate time!
- Time = money
- Figure out the conversion rate from time to money

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- when you think you have the timeline figured out, go back and add 20 percent. You have not added enough time. It is very important we get this judged accurately because budget forecasts are based on the time

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Technical Competence

- All managers are expected to be technical subject matter experts in the main areas of responsibility in the group they lead

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Direct Report Responsibilities

- All managers will be given an organization
- The organization chart does not exist to promote hierarchy; it's only function is to facilitate decision making.
- Thru the normal business process, more than 80% of problems/issues can be resolved at the associate-to-associate level

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Character

- If you lead others, you must set an example

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Impartiality



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Each manager allocated a certain amount of meeting hours per year

- Meetings charged against the meeting budget
- Cost per employee depends on level
- If you need to have the meeting , do it. But you will need to budget for time and money
- All 8 hour time periods are accountable via Slack post
 - Daily updates: 3 sentences. 30 words. Whichever is less. If you like, it can be more
- Managers are required to come to slack first before asking employees a direct question
- If managers are unprepared, we expect employees to report those managers to the anonymous tip line
- If this sounds bad for managers, it is not. IT is freeing. There is less subjectivity in your job.

- Do as much asynchronously as possible
 - Asynchronicity – what is it?
 - Need to work asynchronously as possible
 - This means you need to work from ahead, not from behind.
-
- asdfasdf



Employee One-on-Ones

- Use project plans as a guide
- Always measure in relation to measurable goals
- Employees are expected to be self-advocates
- Managers are expected to be invested in their employees success.
- I view managers as the sum total of their ability to lead and implement company processes, plus their residual technical skills.
- We are NOT a results driven organization
- We are a PROCESS driven organization



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No Fraternization / No Favorites / No Nepotism



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Extreme Accountability

- My wife managed 30 people all by herself during the Pandemic.
- It was a disaster. She had no way of enforcing anything, other than by PIP, firing, or a subjective request process from corporate HR
- People had no incentive to behave like good corporate citizens

- That means for all of this freedom to work, I have to hold everyone accountable.

- Everyone is accountable for this:
 - Maintaining good working relationships with ALL of your co-workers

- Should that include me too? Can I fire myself?

- Fullfillment of all expectations on the employee's yearly

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Smart goals



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SMART Goal Definition

- **Specific:** Increase the chances that you're able to accomplish your business goals by making sure they're well-defined. Determine the who, what, where, when and why.
- **Measurable:** Develop criteria for measuring progress toward your business goals. Detail the key indicators that help you decide if and when you reach your goal by quantifying them.
- **Achievable:** Create goals for your business that are attainable and achievable by ensuring that you and your team have the skills and resources needed to reach the goal.
- **Relevant:** Align your company's goals with the overall objectives of your business and the realities of the market.
- **Time-based:** Give yourself and your staff a deadline for reaching your goal to provide a sense of urgency and the opportunity to schedule the steps needed to achieve the goal.

Growth Mindset

- We shall have a growth mindset
- Write why this is also an act of kindness because there is a natural component of empathy.

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- Be a manager of 1
- Be an advocate for yourself, your work, your company

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- Continuously check in with your project plan, and your personal smart goals
- Adjust and record changes if necessary, or if made

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Concurrent Assignments

- What is a good number for the concurrent assignments?
 - 2, or 3 if the employee requests it
- To those employees who request it, and with whom management concurs, more than 3 concurrent assignments are allowed providing:
 - The action is temporary (lasting less than 1 year)

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Have A Method

- Have a method, follow that method, evaluate that method

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Follow The Method



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Analysis tripod

- What is the analysis Tripod?



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Follow The Scientific Method



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What is your innovation process?

- Pick one, have one, stick to it.



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- Make sure all ideas adhere to the master plan and mission statement

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Ideation Process

- Use outside in method
- Ideas are like programs. They can be broken down into small blocks and then re-synthesized into entirely new ideas through re-arranging the parts
- This is like the Divide-And-Conquer strategy in programming
- Put ideas on a board,
- Under a rough general outline,
 - put the skeleton of the idea together,
 - substituting in known algorithms for the simplest blocks
- Invent new ones for the ones you don't have –
 - Throw into the mix new skills you want to learn, or talent you'd like to acquire, or market you'd like to dominate.
- Re-assemble into a new complicated idea

The Master Plan

- Like Elon's master plan
- Tesla has been following the same overall project plan since 2007.
- Elon update the public via news releases from time to time to let people know where he is in relation to the plan.
- It keeps him accountable
- It keeps me accountable
- Have a Master Plan, Follow The Plan, Check in with the fplan

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What is Your Ideation Process

- Outside-In writing
- Good ideas stick to each other
- Start small, then generalize
- Bad ideas stand out, and can be discarded in the editing process

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Hi Impact / Lo Impact Decisions

- Why they are important
- Why there should be minimal effort given to lo impact decisions, even if they seem important.
- Can you undo it later or is it permanent?
- Good tool to use to focus your work

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Lasso'ing Ideas Together on an Idea Board



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- Make Sure you “spin the data”
- I picture an Excel sheet globe spinning around on my finger instead of a basketball

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- Presenting data in a visually striking manner is the only way to go
- Borders, fonts, etc. matter!
- Someone should be able to look at your data tables and grasp the “story” of the data immediately

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Glossary

- Circle of Competence
- ESG
- DEI



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Definitions

- At-The-Ready – A state of work in which the associate is expected to be available with a ½ hour notice

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ESG Topics

- Environmental
- OAPS



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References

- It Doesn't Have to be Crazy at Work.

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