



## Transcript from November 4, 2010 to November 5, 2010

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All times are Pacific Time

### November 4, 2010

- 2:43 am **3keyscoach:** Join us for this wk's #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz Friday, 12pm ET
- 3:27 am **abarcelos:** RT @3keyscoach: Join us for this wk's #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz Friday, 12pm ET
- 2:45 pm **COSCF0:** Join us for this wk's #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean & Nimble #SmallBiz: <http://ow.ly/34nKD> Friday, 12pm ET
- 3:53 pm **3keyscoach:** Framing post from guest host @COSCF0 for this wk's #kaizenblog <http://bit.ly/9bTD9m>
- 3:53 pm **3keyscoach:** Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz Friday, 12pm ET
- 4:29 pm **ThePRCoach:** Extensive research report on #blogging; excellent analysis #blog #kaizenblog #PR <http://bit.ly/bPhaIM>
- 4:31 pm **wsuprssa:** RT @ThePRCoach: Extensive research report on #blogging; excellent analysis #blog #kaizenblog #PR <http://bit.ly/bPhaIM>
- 5:45 pm **COSCF0:** This wk's #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean & Nimble #SmallBiz: <http://ow.ly/34nSn> Friday, 12pm ET #SMB #BPO
- 7:29 pm **3keyscoach:** Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble Small Business Friday, 12pm ET #entrepreneur #smallbiz
- 7:33 pm **Note\_to\_CMO:** RT @3keyscoach: Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble Small Business Friday, 12pm ET
- 7:36 pm **huperniketes:** RT @3keyscoach: Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean & Nimble #SmallBiz Friday, 12pm ET #entrepreneur
- 7:48 pm **sanchezjb:** RT @3keyscoach Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz Friday, 12pm ET

- 7:51 pm **parissab:** RT @3keyscoach: Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble Small Business Friday, 12pm ET #entrepreneur #smallbiz
- 8:05 pm **CASUDI:** RT@CathyWebSavvyPR ONFriday-hope to show #Kaizenblog chat live on my netbook at @growsmartbiz roundtable discn 12p ET c: @3keyscoach
- 8:15 pm **COSCF0:** This wk's #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean & Nimble #SmallBiz: <http://ow.ly/34nZV> Friday, 12pm ET
- 8:20 pm **ambercleveland:** Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble #SmallBiz Friday, 12pm ET
- 9:00 pm **SterlingHope:** Join @3keyscoach for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble #SmallBiz Friday, 12pm ET
- 9:07 pm **LoisMarketing:** Via @3keyscoach Pls RT Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble #SmallBiz Friday, 12pm ET
- 9:34 pm **wilsonellis:** Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz Friday, 12pm ET
- 10:00 pm **COSCF0:** As Fed Policy Sinks the Dollar, Prices of Essentials Soar: <http://ow.ly/34nIH> #kaizenblog #inflation
- 10:10 pm **CASUDI:** RT@ambercleveland Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble #SmallBiz Friday, 12pm ET
- 10:14 pm **CASUDI:** Can a #smallbiz be too lean & nimble? Is outsourcing a solution? Join guest host @COSCF0 w host @3keyscoach #kaizenblog NOON FRI ET
- 10:15 pm **COSCF0:** Join us for this wk's #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean & Nimble Small Biz: <http://ow.ly/34o3w> Friday, 12pm ET
- 10:18 pm **CASUDI:** @hacool @GetResults @JDEbberly @livepath @DavidSpinks #kaizenblog noon ET FRI ~ Lean & Nimble #smallbiz ~ always GR8 CONVO as U know!

## November 5, 2010

- 12:15 am **COSCF0:** This wk's #kaizenblog- guest host @COSCF0 Topic: Outsourcing & the Lean & Nimble Small Biz: <http://ow.ly/34oat> Friday, 12pm ET #entrepreneur
- 1:35 am **KayWhitaker:** Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble #SmallBiz Friday, 12pm ET
- 6:24 am **blogbertone2:** RT @3keyscoach Managing Transition To Next Stage of Business or Career-#kaizenblog recap <http://ow.ly/19Ovml>
- 6:24 am **NiallDevitt:** RT @3keyscoach Managing Transition To Next Stage of Business or Career-#kaizenblog recap <http://ow.ly/19Ovmk>

- 9:25 am **ivanwalsh:** RT @nialldevitt Managing Transition To Next Stage of Business or Career-#kaizenblog recap <http://ow.ly/19Ovmk>
- 11:57 am **3keyscoach:** Today-Join in #kaizenblog chat w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz Friday, 12pm ET
- 11:58 am **3keyscoach:** Framing post from guest host @COSCF0 for this wk's #kaizenblog <http://bit.ly/9bTD9m> #entrepreneur #smallbusiness
- 12:27 pm **COSCF0:** Framing post from guest host @COSCF0 for this wk's #kaizenblog <http://bit.ly/9bTD9m> #entrepreneur #smallbusiness
- 1:02 pm **dc2fla:** Interesting @sourcepov Today's #kaizenblog focuses on outsourcing & small biz <http://bit.ly/9bTD9m> You know a little about outsourcing, hmm?
- 1:30 pm **COSCF0:** Today-Join in #kaizenblog chat w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz Friday, 12pm ET
- 1:35 pm **KayWhitaker:** Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble #SmallBiz Friday, 12pm ET
- 2:00 pm **COSCF0:** Framing post from guest host @COSCF0 for this wk's #kaizenblog <http://bit.ly/9bTD9m> #entrepreneur #SMB
- 2:05 pm **wilsonellis:** Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz Friday, 12pm ET
- 2:35 pm **ambercleveland:** Join #kaizenblog chat w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble #SmallBiz today 12pm ET cc: @3keyscoach
- 2:38 pm **derekedmond:** Interesting RT @COSCF0: Framing post from guest host @COSCF0 for this wk's #kaizenblog <http://bit.ly/9bTD9m> #entrepreneur #SMB
- 3:10 pm **COSCF0:** Today-Join in #kaizenblog chat w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz Friday, 12pm ET #SMB
- 3:30 pm **sanchezjb:** RT @3keyscoach Join us in 30mins for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & the Lean and Nimble #SmallBiz today, 12pm ET
- 3:31 pm **3keyscoach:** In 30 minutes, talk about "Outsourcing & the Lean and Nimble Small Business" w/ guest host, @COSCF0 #kaizenblog
- 3:35 pm **SterlingHope:** Join us for #kaizenblog w/ guest host @COSCF0 Topic: Outsourcing & Lean & Nimble #SmallBiz Friday, 12pm ET
- 3:35 pm **lesmckeown:** This looks \*great\*: RT @3keyscoach: In 30 mins, "Outsourcing & the Lean and Nimble Small Business" w/ guest host, @COSCF0 #kaizenblog
- 3:45 pm **3keyscoach:** #kaizenblog recap-Managing Transition to Next Stage of Biz/Career <http://bit.ly/a4tiOO>
- 3:47 pm **COSCF0:** Framing post for this wk's #kaizenblog <http://bit.ly/9bTD9m> #entrepreneur #SMB

- 3:48 pm **CoachKate:** RT @3keyscoach: #kaizenblog recap-Managing Transition to Next Stage of Biz/Career <http://bit.ly/a4ti00>
- 3:51 pm **3keyscoach:** @lesmckeown Can you join us today, Les? #kaizenblog
- 3:54 pm **COSCFO:** @liveoaknj You might want to follow #kaizenblog at 12pm...Good information on your CFO needs...
- 3:54 pm **3keyscoach:** @lesmckeown That's too bad. :( Another time I hope. It's always on Friday at 12pm ET #kaizenblog
- 3:59 pm **ken\_rosen:** RT @3keyscoach: In 30 minutes, talk about "Outsourcing & the Lean and Nimble Small Business" w/ guest host, @COSCFO #kaizenblog
- 4:00 pm **ambercleland:** Good morning, looking forward to another great chat. Feel free to join now as @3keyscoach & @COSCFO talk about Lean #smallvbiz #kaizenblog
- 4:00 pm **COSCFO:** Hello! #kaizenblog
- 4:02 pm **ken\_rosen:** @COSCFO Nice post pt: "Spend less on non-client facing disciplines and invest more in core customer focused operations.?" #kaizenblog
- 4:02 pm **ambercleland:** RT @COSCFO Framing post for this wk's #kaizenblog <http://bit.ly/9bTD9m> #entrepreneur #SMB #kaizenblog
- 4:03 pm **3keyscoach:** Great! Who's here? #kaizenblog
- 4:03 pm **COSCFO:** @ken\_rosen It is all about placing the emphasis on what keeps the business growing. #kaizenblog
- 4:04 pm **3keyscoach:** Welcome, everyone! I thought I already posted my greeting! #kaizenblog
- 4:04 pm **3keyscoach:** @ambercleland @ken\_rosen Hello to you both! Glad you're here! #kaizenblog
- 4:05 pm **ambercleland:** @3keyscoach rarely anywhere but here on a Friday morning, it's a great chat and I hate to miss it! #kaizenblog
- 4:05 pm **3keyscoach:** I'd like to introduce everyone to Richard Winter (@COSCFO), our guest host today! This is his company #kaizenblog
- 4:06 pm **ken\_rosen:** TY! Only my 2nd, but was intrigued by my first Kaizenblog RT @3keyscoach: @ambercleland @ken\_rosen Hello to you! Glad here! #kaizenblog
- 4:07 pm **ken\_rosen:** Like Cisco's "core vs. context" obsession RT @COSCFO: @ken\_rosen placing emphasis on what keeps business growing #kaizenblog
- 4:07 pm **3keyscoach:** @ambercleland Happy dance! I Your enthusiasm for learning and connection is awesome! #kaizenblog
- 4:07 pm **3keyscoach:** In #kaizenblog chat, we use concept of "kaizen" to deepen & grow abilities in & understanding of #business <http://bit.ly/9oV7HI>
- 4:07 pm **3keyscoach:** Sorry...some of my tweets are coming out funny... This is @COSCFO's business www. ComprehensiveConsultingServices. #kaizenblog

- 4:07 pm **CASUDI:** @COSCF0 @3keyscoach Interested to hear about when it is appropriate for a #smallbiz to outsource #kaizenblog [correct]
- 4:07 pm **pprothe:** Good morning #kaizenblog - I'll try to join for a bit; have a 9:30 just come up though
- 4:07 pm **COSCF0:** Seeing the cost of building accounting, IT and HR departments as a CFO in a small business gave me the idea. #kaizenblog
- 4:08 pm **3keyscoach:** @ken\_rosen As @ambercleveand can attest, it can be addictive! #kaizenblog
- 4:08 pm **3keyscoach:** Well, let's begin... #kaizenblog
- 4:08 pm **3keyscoach:** Q1 What does it mean for an org to be lean and nimble? (Just want to make sure we're all on the same page) #kaizenblog
- 4:09 pm **3keyscoach:** RT @CASUDI: @COSCF0 @3keyscoach Interested to hear about when it's appropriate for #smallbiz to outsource #kaizenblog [correct] #kaizenblog
- 4:09 pm **3keyscoach:** RT @COSCF0: Seeing the cost of building accounting, IT and HR departments as a CFO in a small business gave me the idea. #kaizenblog
- 4:09 pm **Note\_to\_CMO:** Q1 Lean + nimble suggests spending more time focused on customers/competitors than on internal processes/admin. #kaizenblog
- 4:10 pm **3keyscoach:** @pprothe Hello Patrick! Say hi to our guest host @COSCF0 #kaizenblog
- 4:10 pm **3keyscoach:** @CASUDI Hello Caroline! How's it going today? #kaizenblog
- 4:11 pm **sanchezjb:** RT @3keyscoach Q1 What does it mean for an org to be lean and nimble? A: Responsive to customer needs & market changes. #kaizenblog
- 4:11 pm **COSCF0:** @CASUDI It can be very beneficial in the back office. The outside provider needs to be managed & act like an internal department #kaizenblog
- 4:12 pm **ambercleveand:** A1 - To be operating at maximum efficiency w/ ability to change gears quickly #kaizenblog
- 4:12 pm **3keyscoach:** @Note\_to\_CMO Hello Steve! How's your morning going? #kaizenblog
- 4:12 pm **COSCF0:** @Note\_to\_CMO YEs put the focus on growth leave administrative tasks to toher who are well versed in handling them #kaizenblog
- 4:12 pm **3keyscoach:** RT @Note\_to\_CMO: Q1 Lean + nimble suggests spending more time focused on customers/competitors than on internal processes/admin. #kaizenblog
- 4:12 pm **ken\_rosen:** Agree. Lean/Nimble to me = cost effective/responsive RT @sanchezjb: @3keyscoach Q1 A1: Responsive #kaizenblog

- 4:13 pm **CASUDI:** A1: Staying small & efficient, / getting best value 4 all services / no superfluous organization/mgmt = L&N #kaizenblog
- 4:13 pm **Note\_to\_CMO:** A1 Lean/nimble means able to act/react w/o bureaucracy killing off initiative. #kaizenblog
- 4:13 pm **3keyscoach:** @sanchezjb Hello Joe! #kaizenblog
- 4:14 pm **pprothe:** Lean/nimble means having sound strategy 4 long term, agile enough to react to mkt. changes. But not reactive like hamster wheel #kaizenblog
- 4:14 pm **CASUDI:** @3keyscoach I have seen some companies TOO lean that it restricts their growing #kaizenblog
- 4:14 pm **3keyscoach:** RT @COSCF0: @CASUDI It can be very beneficial in back office.Outside provider needs to be managed & act like internal department #kaizenblog
- 4:14 pm **3keyscoach:** RT @ambercleveland: A1 - To be operating at maximum efficiency w/ ability to change gears quickly #kaizenblog
- 4:15 pm **COSCF0:** @ambercleveland Yes you need to be able to adapt quickly a smallbiz You dont want every change to require a new hire #kaizenblog
- 4:15 pm **3keyscoach:** RT @ken\_rosen: Agree. Lean/Nimble to me = cost effective/responsive RT @sanchezjb: @3keyscoach Q1 A1: Responsive #kaizenblog
- 4:15 pm **ambercleveland:** RT @Note\_to\_CMO: A1 Lean/nimble means able to act/react w/o bureaucracy killing off initiative. #kaizenblog
- 4:16 pm **3keyscoach:** Can you say more? RT @CASUDI @3keyscoach I have seen some companies TOO lean that it restricts their growing #kaizenblog
- 4:16 pm **COSCF0:** @ken\_rosen It is also being a competitor. If competition is paying twice as much as you for accounting you have more leverage #kaizenblog
- 4:17 pm **3keyscoach:** Q2 How does small business use outsourcing in general? #kaizenblog
- 4:17 pm **Note\_to\_CMO:** A1 Outsourcing works for admin/non-client-facing work. Clients dont like customer-facing outsourcing (risk of losing key ppl) #kaizenblog
- 4:17 pm **sanchezjb:** @3keyscoach Back at you and @COSCF0! #kaizenblog
- 4:17 pm **hacool:** A1: Not letting bureacracy/procedure trump service - being able to adapt to customer needs as necessary. #kaizenblog
- 4:17 pm **Note\_to\_CMO:** A2 Small biz uses outsourcing for admin, creative, non-"sales/acct mgmt" side of things. #kaizenblog
- 4:17 pm **COSCF0:** @CASUDI Yes and in some instances outsourcing can be adding a critical discipline like HR that doesnt already exist. #kaizenblog

- 4:17 pm **3keyscoach:** Tricky balance. RT @Note\_to\_CMO: A1 Lean/nimble means able to act/react w/o bureaucracy killing off initiative. #kaizenblog
- 4:18 pm **ken\_rosen:** Good point re external implications--not just internal biz RT @COSCF0: @ken\_rosen It is also being a competitor. #kaizenblog
- 4:18 pm **3keyscoach:** @Note\_to\_CMO Is this when sponsorship is crucial? #kaizenblog
- 4:18 pm **hacool:** @3keyscoach Small biz can outsource things that are outside their own skillset for things that wouldn't require an FTE. #kaizenblog
- 4:19 pm **COSCF0:** @pprothe Its about focus too. If you are waiting weeks to close the books by the time you analyze your are mired in the past. #kaizenblog
- 4:19 pm **sanchezjb:** Q1. Like @ken\_rosen 's emphasis on "cost effective responsiveness" as an attribute of being lean & nimble. #kaizenblog
- 4:19 pm **ambercleveland:** RT @COSCF0: Yes you need to be able to adapt quickly a smallbiz You dont want every change to require a new hire #kaizenblog
- 4:19 pm **3keyscoach:** RT @pprothe Lean/nimble->having sound strategy 4 long term, agile enough 2 react 2 mkt chgs. But not reactive like hamster wheel #kaizenblog
- 4:19 pm **ken\_rosen:** A2 For us:finance, creative, bandwidth. Experiments outsourcing to those we don't know largely unsuccessful #kaizenblog
- 4:19 pm **ambercleveland:** RT @hacool: A1: Not letting bureacracy/procedure trump service - being able to adapt to customer needs as necessary. #kaizenblog
- 4:20 pm **ambercleveland:** RT @3keyscoach: Q2 How does small business use outsourcing in general? #kaizenblog
- 4:20 pm **3keyscoach:** @hacool Hello Heidi! Good to have you here! #kaizenblog
- 4:21 pm **3keyscoach:** @Note\_To\_CMO Sponsorship is when CEO or other member of exec team (or high level influencer) advocates for & supports initiative #kaizenblog
- 4:21 pm **pprothe:** Agree! RT @COSCF0: Its about focus too. If you are waiting wks 2 close the books by time you analyze you're mired in the past. #kaizenblog
- 4:22 pm **ken\_rosen:** Thx.See ur a pub sector guy. Comes up in our PubSec governance pjts RT @sanchezjb: @ken\_rosen on "cost effective responsiveness" #kaizenblog
- 4:22 pm **ambercleveland:** RT @hacool: #Smallbiz can outsource things that are outside their own skillset for things that wouldnt require an FTE. #kaizenblog
- 4:22 pm **tisasilver:** @3keyscoach Out to lunch but checking in on #kaizenblog. Hello everyone!

- 4:22 pm **sanchezjb:** General "rule of thumb: Don't outsource core competencies. This means knowing what those core competencies are. #kaizenblog
- 4:22 pm **3keyscoach:** RT @COSCF0: @ken\_rosen It is also being competitor If competition is paying 2x as much as U for accounting U have more leverage #kaizenblog
- 4:22 pm **3keyscoach:** RT @ken\_rosen: A2 For us:finance, creative, bandwidth. Experiments outsourcing to those we dont know largely unsuccessful #kaizenblog
- 4:23 pm **COSCF0:** @hacool You can see it very clearly in HR. Small biz doesnt want to pay the \$80k + for a good manager. #kaizenblog
- 4:24 pm **3keyscoach:** Outsourcing can be stepping stone to hiring full-time employees. Can be cost-effective to hire specialist in underserved area #kaizenblog
- 4:24 pm **ambercleveland:** RT @3keyscoach: Sponsorship is when CEO/other member of exec team (or high level influencer) advocates for & supports initiative #kaizenblog
- 4:24 pm **3keyscoach:** RT @sanchezjb: General "rule of thumb: Dont outsource core competencies. This means knowing what those core competencies are. #kaizenblog
- 4:24 pm **COSCF0:** @sanchezjb Yes great point. Step one of the process for a smallbiz is defining the core first. #kaizenblog
- 4:25 pm **CASUDI:** @sanchezjb good idea to understand what U R lease efficient at doing in house & > outsource (saving time = saving \$) #kaizenblog
- 4:25 pm **ambercleveland:** @COSCF0 I've seen that in relation to HR and it exposes the company to a great deal of risk #kaizenblog
- 4:26 pm **ken\_rosen:** A2 impt soul searching question:when is it about saving money & when about raising svc quality? #kaizenblog
- 4:26 pm **3keyscoach:** In framing post <http://bit.ly/9bTD9m> @COSCF0 referred to ESA's as Established Service Center Alliances #kaizenblog
- 4:26 pm **COSCF0:** RT @3keyscoach: Outsourcing can be stepping stone to hiring FT employees. Yes let an external group build P&P to follow later #kaizenblog
- 4:26 pm **Note\_to\_CMO:** A2 Another key q is when you hit that pt where "make vs buy" suggests a F/T is more efficient. #kaizenblog
- 4:27 pm **3keyscoach:** RT @COSCF0: @hacool You can see it very clearly in HR. Small biz doesnt want to pay the \$80k + for a good manager. #kaizenblog
- 4:27 pm **3keyscoach:** RT @CASUDI @sanchezjb good idea to understand what U R lease efficient at doing in house & > outsource (saving time = saving \$) #kaizenblog
- 4:27 pm **Note\_to\_CMO:** Of course indi sales reps have built many a small brand. Guess we shouldn't disparage outsourcing "customer facing" too fast. #kaizenblog

- 4:27 pm **pprothe:** +1 RT @CASUDI: @sanchezjb good idea to understand what U R least efficient doing in house & > outsource (saving time=saving \$) #kaizenblog
- 4:27 pm **CASUDI:** I am recommending VA's to solo~entrepreneurs and v. small start UP I mentor ~ with big payback/success #kaizenblog @3keyscoach
- 4:28 pm **3keyscoach:** RT @ken\_rosen: A2 impt soul searching question:when is it about saving money & when about raising svc quality? #kaizenblog
- 4:28 pm **3keyscoach:** @tisasilver Hi Tisa! #kaizenblog
- 4:28 pm **COSCFO:** RT @CASUDI: @sanchezjb good idea to understand what U R lease efficient at Beeing self aware is critical for smallbiz owner #kaizenblog
- 4:28 pm **3keyscoach:** RT @CASUDI: I am recommending VAs to solo~entrepreneurs and v. small start UP I mentor ~ with big payback/success #kaizenblog
- 4:29 pm **3keyscoach:** Q3 What are ESA must-haves for the small business owner? #kaizenblog
- 4:29 pm **ambercleveland:** I think it is also about identifying the strengths and weaknesses of the org, what is the best/highest use of your time? #kaizenblog
- 4:29 pm **CASUDI:** @ken\_rosen If U have to save money & it diminishes yur service/output U need to look at saving v spending #kaizenblog
- 4:30 pm **saraestescohen:** RT @sanchezjb: General "rule of thumb: Don't outsource core competencies. This means knowing what those core competencies are. #kaizenblog
- 4:30 pm **3keyscoach:** RT @ambercleveland: I think it is also about identifying strengths & weaknesses of org, what is best/highest use of your time? #kaizenblog
- 4:31 pm **3keyscoach:** RT @COSCFO: @sanchezjb Yes great point. Step one of the process for a smallbiz is defining the core first. #kaizenblog
- 4:31 pm **ambercleveland:** RT @CASUDI: If U have to save money & it diminishes yur service/output U need to look at saving v spending #kaizenblog
- 4:31 pm **3keyscoach:** Being clear about core competencies and core values makes easier to communicate expectations to VA's & other ESA's #kaizenblog
- 4:31 pm **COSCFO:** RT @ken\_rosen: HR point on not wanting to spend then owner finds out a lawsuit won costs \$250k #kaizenblog
- 4:31 pm **ken\_rosen:** If there is a VA firm you respect, would love a link RT @3keyscoach: RT @CASUDI: I am recommending VAs #kaizenblog
- 4:31 pm **pprothe:** Thanks @COSCFO for guest hosting #kaizenblog - sorry I have to run. Will check the transcript!

- 4:32 pm **ambercleveland:** Yes RT @sanchezjb: General "rule of thumb: Dont outsource core competencies This means knowing what those core competencies are. #kaizenblog
- 4:32 pm **3keyscoach:** Q3 What are ESA must-haves for the small business owner? c: @COSCF0 #kaizenblog
- 4:32 pm **COSCF0:** @pprothe Thanks for checking in #kaizenblog
- 4:32 pm **ken\_rosen:** Can you say more on what you mean Caroline? RT @CASUDI: @ken\_rosen If U have to save money & it diminishes yur service/output.. #kaizenblog
- 4:32 pm **3keyscoach:** @pprothe See you around, Patrick. Sorry you have to go! Have a great weekend! #kaizenblog
- 4:33 pm **3keyscoach:** @ken\_rosen Check out @yourjobmyoffice She's very good! #kaizenblog
- 4:33 pm **ken\_rosen:** Yep, gr8 example RT @COSCF0: RT @ken\_rosen: HR point on not wanting to spend then owner finds out a lawsuit won costs \$250k #kaizenblog
- 4:34 pm **ken\_rosen:** TY RT @3keyscoach: @ken\_rosen Check out @yourjobmyoffice Shes very good! #kaizenblog
- 4:34 pm **COSCF0:** ESAs are an arrangement that not only delivers the administrative work but also provides analysis and suggestive insights #kaizenblog
- 4:34 pm **3keyscoach:** Greetings to @CathyWebSavvyPR! How's your talk going? #kaizenblog
- 4:35 pm **3keyscoach:** RT @COSCF0: ESAs are arrangement that not only delivers administrative work but also provides analysis & suggestive insights #kaizenblog
- 4:35 pm **COSCF0:** ESA's deliver part time CFO/COO/CIO capabilities #kaizenblog
- 4:36 pm **COSCF0:** ESAs would offer direct involvement in management meetings and discussions #kaizenblog
- 4:37 pm **wilsonellis:** The key to successful outsourcing is in-house management. Have a liaison person responsible for communications/ monitoring. #kaizenblog
- 4:37 pm **3keyscoach:** @COSCF0 Sounds like ESA's aren't simply just outsourcing the work. What are some examples? #kaizenblog
- 4:37 pm **3keyscoach:** Advisors? Consultants? RT @COSCF0: ESAs would offer direct involvement in management meetings and discussions #kaizenblog
- 4:38 pm **3keyscoach:** RT @wilsonellisKey 2 successful outsourcing is in-house mgt. Have a liaison person responsible for communications/ monitoring. #kaizenblog
- 4:38 pm **ambercleveland:** RT @wilsonellis: The key to successful outsourcing is in-house mgmt. A liaison responsible for communications/ monitoring. #kaizenblog
- 4:38 pm **COSCF0:** An ESA for finance and accounting would provide analysis insights and reporting in addition to day-to-day Ap and AR etc... #kaizenblog

- 4:39 pm **CASUDI:** @ken\_rosen when U cut back from key areas like marketing (always seems to b cut first) this can diminish yur biz #kaizenblog
- 4:39 pm **3keyscoach:** @GetResults Hello John! Come add your 2 cents! #kaizenblog
- 4:39 pm **3keyscoach:** Q5 What are the pitfalls to outsourced back office operations? c: @COSCF0 #kaizenblog
- 4:39 pm **3keyscoach:** RT @CASUDI: @ken\_rosen when U cut back from key areas like marketing (always seems to b cut first) this can diminish yur biz #kaizenblog
- 4:39 pm **COSCF0:** This is critical for success RT @ambercleland: RT @wilsonellis: A liaison responsible for communications/monitoring. #kaizenblog
- 4:40 pm **sanchezjb:** @COSCF0 "ESA" stands for? #kaizenblog
- 4:40 pm **WriterChanelle:** About to get into #kaizenblog from #smallbizchat Hi!!
- 4:40 pm **3keyscoach:** RT @COSCF0: An ESA for finance & accounting wld provide analysis insights & reporting in addition to day-to-day Ap and AR etc... #kaizenblog
- 4:40 pm **ken\_rosen:** Ah yes. Clear now. Thx RT @CASUDI: @ken\_rosen whecut back on key areas like mktg, this can diminish biz #kaizenblog
- 4:41 pm **ambercleland:** A5 - Lack of communication and understanding of internal happenings #kaizenblog
- 4:41 pm **CASUDI:** @ken\_rosen A #smallbiz I mentor used @yourjobmyoffice for all admin incl proposals & got 9 out of 10 jobs. Big benefits also #kaizenblog
- 4:41 pm **COSCF0:** RT @3keyscoach: RT @CASUDI: @ken\_rosen when U cut back from key areas like marketing Competitive smallbiz needs to avoid these #kaizenblog
- 4:41 pm **ysnjen:** RT @COSCF0: This is critical for success RT @ambercleland: RT @wilsonellis: A liaison responsible for communications/monitoring. #kaizenblog
- 4:41 pm **ken\_rosen:** Hello Chanelle RT @WriterChanelle: About to get into #kaizenblog from #smallbizchat Hi!! #kaizenblog
- 4:41 pm **3keyscoach:** @WriterChanelle Hello Chanelle! #kaizenblog
- 4:41 pm **3keyscoach:** RT @ambercleland: A5 - Lack of communication and understanding of internal happenings #kaizenblog
- 4:41 pm **Note\_to\_CMO:** A5 Pitfall to outsourcing sales (ie, indi reps) is that yr brand becomes attached to their style/personality (lack of urgency?) #kaizenblog
- 4:42 pm **3keyscoach:** RT @CASUDI A #smallbiz I mentor used @yourjobmyoffice for all admin incl propls Got 9 out of 10 jobs. Big benefits also #kaizenblog
- 4:42 pm **CASUDI:** A5 ~ losing control, not knowing what is going on , getting inferior work, costing 2 much #kaizenblog

- 4:42 pm **COSCF0:** Yes and defined internal player to manage ESA RT @ambercleveland: A5Lack of communication & understanding of internal happenings #kaizenblog
- 4:43 pm **3keyscoach:** RT @Note\_to\_CMO A5 Pitfall 2 outsrc'g sales (ie, indi reps)->yr brnd becms attached 2 their style/personality (lack of urgency?) #kaizenblog
- 4:43 pm **3keyscoach:** RT @CASUDI: A5 ~ losing control, not knowing what is going on , getting inferior work, costing 2 much #kaizenblog
- 4:43 pm **COSCF0:** All ESA must have a flat rate agreement!!! RT @CASUDI: A5 ~ losing control, not knowing what is going on #kaizenblog
- 4:43 pm **ken\_rosen:** Q: As relationship gets more consultative, harder to scope/price? In sr retainers, makes sense. But support? #kaizenblog
- 4:43 pm **3keyscoach:** RT @COSCF0: Yes and defined internal player to manage ESA #kaizenblog
- 4:44 pm **3keyscoach:** RT @COSCF0: All ESA must have a flat rate agreement!!! RT @CASUDI: A5 ~ losing control, not knowing what is going on #kaizenblog
- 4:44 pm **3keyscoach:** RT @ken\_rosen: Q: As relationship gets more consultative, harder 2 scope/price? In sr retainers, makes sense But support? @COSCF0 #kaizenblog
- 4:45 pm **3keyscoach:** Q6 How will this trend go once the economy turns for the better? #kaizenblog
- 4:45 pm **COSCF0:** @ken\_rosen Best to use a clearly defined service level agreement with a fixed cost to govern the arrangement #kaizenblog
- 4:46 pm **3keyscoach:** RT @COSCF0: @ken\_rosen Best to use a clearly defined service level agreement with a fixed cost to govern the arrangement #kaizenblog
- 4:47 pm **3keyscoach:** We have about 15 more minutes left in main part of chat. #kaizenblog
- 4:47 pm **ken\_rosen:** In your exper, does this tend to satisfy both players? RT @COSCF0: @ken\_rosen clearly defined SLA with a fixed cost #kaizenblog
- 4:47 pm **wilsonellis:** A5: loss of control and insight. Hands-on can make a big difference. #kaizenblog
- 4:47 pm **3keyscoach:** Rephrased Q6-How will trend of outsourcing/contracting/ESA's go once economy turns for better? #kaizenblog
- 4:48 pm **COSCF0:** A6: Fiercely competitive small businesses will drive the back office expense down lower so more can be poured in marketing & sales #kaizenblog
- 4:48 pm **wilsonellis:** RT @ambercleveland: A5 - Lack of communication and understanding of internal happenings #kaizenblog
- 4:48 pm **3keyscoach:** RT @wilsonellis: A5: loss of control and insight. Hands-on can make a big difference. #kaizenblog

- 4:48 pm **3keyscoach:** RT @COSCF0: A6: Fiercely competitive #smallbiz will drive back office expense down lower so more can B poured in marketing & sales #kaizenblog
- 4:48 pm **mzayfert:** @Note\_to\_CMO Outsourcing sales is good Message is focused usually follow script better also roles of sales (people) are changing #kaizenblog
- 4:48 pm **COSCF0:** @ken\_rosen Yes if gives the owner cost cetainty and the provider a clear set of defined respnsibilites. #kaizenblog
- 4:49 pm **sanchezjb:** Risks 2 outsourcing back office ops can b mitigated via strong service level agreements (SLAs) w/the provider. #kaizenblog
- 4:49 pm **ken\_rosen:** A6 On practical basis,when fewer quality ppl looking 4 work, quality outsourcers will win #kaizenblog
- 4:49 pm **3keyscoach:** @ken\_rosen @COSCF0 I wonder if clearly defined SLA will illustrate value of arrangment? #kaizenblog
- 4:49 pm **mzayfert:** RT @COSCF0: @ken\_rosen Best to use a clearly defined service level agreement with a fixed cost to govern the arrangement #kaizenblog
- 4:50 pm **3keyscoach:** RT @mzayfert Outsourcing sales is good Message is focused usually follow script better also roles of sales (people) R chg'g #kaizenblog
- 4:50 pm **3keyscoach:** RT @ken\_rosen: A6 On practical basis,when fewer quality ppl looking 4 work, quality outsourcers will win #kaizenblog
- 4:50 pm **3keyscoach:** RT @sanchezjb: Risks 2 outsourcing back office ops can b mitigated via strong service level agreements (SLAs) w/the provider. #kaizenblog
- 4:51 pm **3keyscoach:** RT @COSCF0: @ken\_rosen Yes if gives the owner cost certainty and the provider a clear set of defined respnsibilites. #kaizenblog
- 4:51 pm **Note\_to\_CMO:** @mzayfert Thinking more of indi sales reps calling on major retail, not as much inside sales. Both have bene's/ drawbacks. #kaizenblog
- 4:51 pm **pushingvision:** Missing #kaizenblog today. Bummed. Hi folks! #kaizenblog
- 4:51 pm **COSCF0:** And owner avoids turnover and recruiting costs RT @ken\_rosen:when fewer quality ppl looking 4 work, quality outsourcers will win #kaizenblog
- 4:51 pm **wilsonellis:** A6: Outsourcing is a good way to leverage resources if managed well. It works in any economy. #kaizenblog
- 4:52 pm **ken\_rosen:** @COSCF0 @sanchezjb Do providers tend to have strong starting-point SLA docs? Although vested interest, wd know more #kaizenblog
- 4:52 pm **CASUDI:** KEY is to manage those you outsource ~ esp for #smallbiz w. limited resources ~ out sourceing has been known 2BHELL #kaizenblog

- 4:53 pm **COSCF0:** @ken\_rosen Yes I have several base SLA docs that evolved overtime as more lawyers have vetted them. #kaizenblog
- 4:54 pm **ken\_rosen:** Yep, I've stopped outsourcing critical path items because of scar tissue! RT @CASUDI:outsourcing known 2BHELL #kaizenblog
- 4:54 pm **3keyscoach:** RT @Note\_to\_CMOThinking more of indi sales reps calling on major retail, not as much inside sales. Both have benes/drawbacks. #kaizenblog
- 4:54 pm **3keyscoach:** RT @COSCF0: And owner avoids turnover and recruiting costs #kaizenblog
- 4:54 pm **ken\_rosen:** Do you share with clients? ..w/your flwrs? ;-) RT @COSCF0: @ken\_rosen I have several base SLA docs #kaizenblog
- 4:55 pm **3keyscoach:** RT @wilsonellis: A6: Outsourcing is a good way to leverage resources if managed well. It works in any economy. #kaizenblog
- 4:55 pm **CASUDI:** @wilsonellis What is good about our~sourcing in downturn ~ U only pay for what exactly you need ~no~one sits around #kaizenblog
- 4:55 pm **3keyscoach:** 5 minutes to end of main part of chat #kaizenblog
- 4:55 pm **COSCF0:** @ken\_rosen Sure DM me and I will send you an example #kaizenblog
- 4:56 pm **CASUDI:** @ken\_rosen agree critical items =in house, but what I call "grunge items" = outsource (but always watch NMW) #Kaizenblog
- 4:56 pm **3keyscoach:** Thank you Richard Winter @COSCF0 for guest hosting today! Good to learn more about outsourcing, types, & how to define relationship #kaizenblog
- 4:56 pm **3keyscoach:** RT @CASUDI: @wilsonellis What is good about our~sourcing in downturn ~ U only pay for what exactly you need ~no~one sits around #kaizenblog
- 4:57 pm **wilsonellis:** @CASUDI Agreed. It works well in good times, too. : ) #kaizenblog
- 4:57 pm **3keyscoach:** RT @CASUDI: @ken\_rosen agree critical items =in house, but what I call "grunge items" = outsource (but always watch NMW) #kaizenblog
- 4:57 pm **COSCF0:** Remember inflation is on the way. COGS will increase everywhere. Already happening with food. Need to find savings in overhead #kaizenblog
- 4:58 pm **amercleveland:** RT @3keyscoach: Rephrased Q6-How will trend of outsourcing/contracting/ESAs go once economy turns for better? #kaizenblog
- 4:58 pm **CASUDI:** RT@yourjobmyoffice @CASUDI ~ The way the economy has been, grateful for the oppt'y to work. Being so appreciated is a bonus! #kaizenblog

- 4:58 pm **3keyscoach:** RT @COSCF0 Remembr inflatn is on the way COGS will increase everywhere. Already happn'g w/ food. Need 2 find savings in overhd #kaizenblog
- 4:58 pm **ambercleveland:** RT @COSCF0: Remember inflation is on the way. COGS will increase everywhere. Need to find savings in overhead #kaizenblog
- 4:59 pm **ken\_rosen:** TY @3keyscoach @coscfo. Topic is hot one for me, but failures out # successes for us. But this has been good encouragement #kaizenblog
- 4:59 pm **CASUDI:** @COSCF0 I thought we were experiencing deflation (according to govt) yet supermarket indicate opposite I agree #kaizenblog
- 4:59 pm **3keyscoach:** Thank you everyone for engaging in today's topic: Outsourcing & the Lean and Nimble #SmallBiz #kaizenblog
- 5:00 pm **COSCF0:** @ken\_rosen No different than bad hire you can get a bad provider. Need to develop trust with them over time #kaizenblog
- 5:00 pm **ambercleveland:** RT @CASUDI: KEY is to manage those you outsource ~ esp for #smallbiz w. limited resources ~ outsourcing has been known 2BHELL #kaizenblog
- 5:01 pm **COSCF0:** @CASUDI Just look at investment in TIPS. Wealthy people know inflation is coming and they are hedging against it. #kaizenblog
- 5:01 pm **ambercleveland:** @COSCF0 Absolutely agree. Hiring & outsourcing are more critical than ever #kaizenblog
- 5:01 pm **3keyscoach:** @ken\_rosen Good to hear! Thanks for participating in convo! Appreciate tough questions! Very much in chat spirit! c: @COSCF0 #kaizenblog
- 5:01 pm **3keyscoach:** RT @COSCF0: @CASUDI Just look at investment in TIPS. Wealthy people know inflation is coming and they are hedging against it. #kaizenblog
- 5:02 pm **3keyscoach:** RT @COSCF0: @ken\_rosen No different than bad hire you can get a bad provider. Need to develop trust with them over time #kaizenblog
- 5:02 pm **wilsonellis:** @COSCF0 Do you have a checklist of things that should be included in the docs? Would be a good resource for potential clients. #kaizenblog
- 5:02 pm **COSCF0:** I really appreciate everybody well thought out interaction. This was great! #kaizenblog
- 5:02 pm **ken\_rosen:** Ok, but 1 diff: w/hire, deep resrch=ROI. For provider, resrch absorbs benefits RT @COSCF0: @ken\_rosen No different than bad hire #kaizenblog
- 5:03 pm **3keyscoach:** Thank you @pprothe @ambercleveland @wilsonellis @Note\_To\_CMO @ken\_rosen @sanchezjb @CASUDI #kaizenblog
- 5:03 pm **COSCF0:** @wilsonellis Yes I do. Scary to say but my SLA's are usuall well over 20 pages. #kaizenblog

- 5:04 pm **3keyscoach:** For anyone who wants the After Party (LOL), starts now! #kaizenblog
- 5:04 pm **3keyscoach:** RT @COSCF0: @wilsonellis Yes I do. Scary to say but my SLAs are usuall well over 20 pages. #kaizenblog
- 5:05 pm **3keyscoach:** I'll be posting transcript in later. Recap will also be posted next week #kaizenblog
- 5:06 pm **3keyscoach:** #kaizenblog folk-what topics are on your mind lately? Would love to recruit subject matter experts to delve deeper! #kaizenblog
- 5:06 pm **wilsonellis:** @COSCF0 Do you use the checklist to differentiate between you and the competition? I find that it helps in consulting. #kaizenblog
- 5:06 pm **ambercleland:** Thanks again Elli @3keyscoach for hosting another great chat and @COSCF0 for sharing your insight #kaizenblog
- 5:07 pm **3keyscoach:** @ambercleland You're welcome, Amber! #kaizenblog
- 5:07 pm **COSCF0:** @wilsonellis Yes I spend significant time researching who is doing what #kaizenblog
- 5:08 pm **3keyscoach:** @COSCF0 Do you have any other resources where we can learn more about outsourcing effectively? #kaizenblog
- 5:08 pm **wilsonellis:** Thank you for #kaizenblog @3keyscoach @COSCF0 @ambercleland @CASUDI #kaizenblog
- 5:08 pm **ambercleland:** Great to see you as always @wilsonellis @CASUDI @pprothe @ken\_rosen @Note\_to\_CMO @sanchezjb @mzayfert :) #kaizenblog
- 5:09 pm **wilsonellis:** @COSCF0 Me, too. #kaizenblog
- 5:10 pm **3keyscoach:** @wilsonellis You're welcome, Debra! Glad you got value out of today's chat! #kaizenblog
- 5:10 pm **bcoelho2000:** HI #kaizenblog Great to be here!! I'm Bruno Coelho and I'm in the business of unleashing people's creativity&inspire them to change the World!
- 5:10 pm **3keyscoach:** Off to check out transcript... #kaizenblog
- 5:11 pm **3keyscoach:** @bcoelho2000 Hiya Bruno! We just ended. :( #kaizenblog