

Petra Coach
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4 Steps to Move your Business from Defense to Offense in Times of Disruption



"Everyone has a plan until they get punched in the mouth."

-Mike Tyson



Before March 2020, the U.S. market was in full swing and unemployment was at an all-time low. We were fat and happy. Fast forward to Mid-March 2020. In the blink of an eye, we were all sucker punched. Cast from boomtown to dystopia. Chief U.S. economist at Oxford Economics summarizes it best when he compares the plunge to "...a natural disaster, a terrorist attack and a financial shock all at once. We've never had this in history."

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You thought your business was strong. But, that was when everything was working in your favor. You hadn't stepped in the ring and faced a worthy opponent in quite some time—maybe ever. Then, disruption challenges you, exposes all of your blind spots and tests all your reputed strengths.

It hurts. It's painful. AND, it's not all bad.

It's an opportunity.

An opportunity to adapt, improve and transform. You just need the tools. The steps to face disruption head on and evolve into something stronger, leaner and ready for the upturn.

Andy Bailey, founder of leading business coaching firm, Petra Coach and best-selling leadership author, developed a four-step process to get business leaders off their backs and back in control. It's called D.S.R.O. planning and stands for Defense, Stabilize, Reset and Offense.

This process was developed specifically to help Petra Coach's members across the globe take their businesses from defense toward offense rapidly amid disruption. Now, Andy's relaying the process to you. All so that you too can take your business from defense to offense.

It's all in this E-book.

Before you dive in, there's one more thing to note: While this was developed in response to COVID-19 disruption, we recommend leveraging this process for that purpose and beyond. In the future, when this is behind us, you can use this methodology to disrupt yourself. Think of it as continually sparring in the ring so that next time the universe wants to sucker punch you, you're ready with a preemptive strike. You need to remain scrappy. At its core, D.S.R.O. is a formula to combat complacency. Consume the information through that lens.

Before we jump in to the four steps, let's get back to basics and gain a clear picture of the current state of your business. You can only chart an efficient path to get where you want to go, when you know precisely where you are.

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Short-Term SWOT

The best way to pinpoint your precise coordinates is with a SWOT. Instead of North, South, East and West, its Strengths, Weaknesses, Opportunities and Threats. For D.S.R.O. planning, you need a short-term SWOT. One that identifies where you are in this exact moment. A moment that's wrought with extenuating circumstances.

We created a short-term SWOT you can [access and edit here](#). Ask everyone on your leadership team to fill this out independently. Compile everyone's answers and then come together to agree on your collective responses.

As you go through this exercise, remember:

Strengths: These are the internal capabilities, attributes, skills and/or assets within your control you can optimize.

Weaknesses: These are the internal factors within your control you can eliminate.

Opportunities: These are those external factors that could help the organization grow. Conceptualizing and targeting these opportunities are in your control but the result is beyond your control.

Threats: These are the external factors that are beyond your control that are hurting or could hurt your organization.



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Now that we know where we are, let's dig in so we can chart a plan toward offense.

D. Defense.

If we want to get to offense (and we do we have to start with a strong defense. In this phase, it's all about identifying actionable safeguards you can put in place. The right safeguards act as the foundation of your company, giving you a solid foundation you can build upon.

Quick detour/soap box here. In Defense phase, you must obsess over cash. Reduce where needed. If it's not providing value, get rid of it. Comb through your credit card charges, find those miscellaneous \$32 charges you ignored previously and get rid of that app you don't use anymore. Those vendors that require more work than they're worth, negotiate a better deal or cut them. Get lean. Cut out the things that don't make you stronger.

Set up a daily cash report where you can easily see what went out the day before and what came in. Speed up AR and Slow down AP. Go after offered relief for your business. (Amid COVID that's CARES Act. We are actually offering helpful workshops for your business on that. [Find one that suits your schedule here](#). And, in this phase, you'll realize more than ever, that your relationship with your banker is essential. Remember that. You'll need him or her if/when a cash crunch happens again.

Here's a list of five questions for consideration in Defense phase. Ask yourself these. Make sure you have sufficient answers and then move to phase S.

[*Access more questions here.](#)

1. Physical considerations – What is the process of shutting down operations and safely moving employees to remote workforce?
2. Meeting rhythms - How will you stay connected with everyone in a virtual environment?
3. Information access - What employees are a single holder of information that if they became ill would place risk on the business?
4. Virtual considerations - What needs to happen with technology or processes to move to a full virtual environment?
5. Financial relationships and Cash Management - How quickly can you contact key banking relationships and review expenses to position yourself to conserve cash in the short run?

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S. Stabilize.

The secret to stabilization is relentless communication with everyone. That includes internally with your teams AND externally with your customers.

When it comes to internal communication, we of course live by the daily huddle. In disruptive times, double that. Make sure your team comes together at the beginning and end of each day to meet virtually. The first huddle can follow a typical huddle format (what's up, priority review and top task for the day. The second can be more relaxed. Start with the prompt "What good thing happened in your day today?" Many of our members are using this second huddle as a time to keep company culture front and center. Virtual happy hour anyone?

As far as external communication, in a crisis, there's no such thing as too much communication. Find a way to be most helpful to your members (clients, prospects and general audience. When it comes to members, a good format for discussion is employing John DiJulius's F.O.R.D. concept. It's a strategy to connect on a deeper level. It stands for Family, Occupation, Recreation and Dreams. When you're talking with someone, zone in on these aspects of their life. AND, truly listen and remember what they say. You might find that out of these conversations comes the next great idea for how you and your company can become even more valuable to the people you serve.

Here's a list of five questions for consideration in Stabilize phase. Ask yourself these. Make sure you have sufficient answers and then move to phase R.

[*Access more questions here.](#)

1. Company culture - Who is the culture warrior during these times and is keeping the workforce in harmony?
2. Emotional and family support - What employees and families have fallen on hard times or need help managing family situations in order to be able to work?
3. Team retention - How can we stay connected to those furloughed or laid off to keep them engaged so they are not lost?
4. Relief - What government relief is helpful to manage through this crisis?
5. Customer communication- What are our communication rhythms and strategies for connecting with customers?

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R. Reset.

Okay – you're stable. You've caught your breath. By completing the first two steps, D. and S., you've put out the immediate fires and have gained the ground to begin re-prioritizing. It's time to gear up before you go all out on your offense.

Start by picking a date. In COVID times this looks like, determining how much longer your business will be in disruption mode based on when you think the upturn will begin. For example, let's choose August 2020.

The date doesn't have to be right. It has to be your best guess. Pick it. Set it. Start crafting a plan that moves toward that target.

Also, in this phase, dip your toe into selling again. While it's no time for ambulance, you don't have to apologize for offering something helpful and valuable that people need during this time.

Granted, it's not a great time to be cold calling a prospect about a custom suit. If you sell custom suits for a living, pivot. Begin creating something that people do need right now. Something that will truly help them.

We recommend creating an internal opportunity task force. This group will identify and help create solutions to the most pressing challenges your audience is facing.

Here's a list of five questions for consideration in Reset phase. Ask yourself these. Make sure you have sufficient answers and then move to phase O.

[*Access more questions here.](#)

1. Personnel Management - What is our restart date and what essential employees must return first?
2. Restart Plan - Do we have a plan for the first 30 days, and does it include scenarios if things change?
3. Physical considerations - Does the office space have to be redesigned, do employees need PPE, and should we adopt new cleaning protocols?
4. Policies and Procedures - Do we have new operating policies for our employees, guests, and customers that we will interact with?
5. Virtual Sales - Are we able to continue selling in a virtual capacity?

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O. Offense.

You've faced the tough facts. You've surveyed your team and your clients. You've gone back to the drawing board. You're ready.

Take your cards out of fate's hands and shift into offense. Put your findings and your ideas into a concrete action plan — complete with associated KPIs. (Need help? That's what we at Petra help businesses do. [Attend one of our Pivot Planning workshops.](#) We'll dive into your specific business and help you create the aforementioned plan.

And hey, remember, this should be fun. This is why you got into business to begin with. To build. To innovate. To offer the world something that will make it better. If you're a true entrepreneur, this is the opportunity of a lifetime. Buckle up. Get to work.

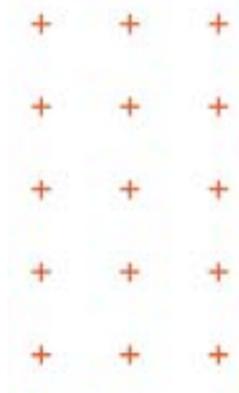
Here's one offensive power move you can do now. Create your top 25 dream client of clients you want to work with. Use LinkedIn to connect. Describe how your solution can help them solve a challenge they're losing sleep about. Ask to schedule a 15-minute video chat to discuss further.

Here's a list of five questions for consideration in Offense phase. Ask yourself these. Make sure you have sufficient answers and then, take a breath. Don't get too comfortable though. Stay ready. Stay in the ring. Never stop fighting.

[*Access more questions here.](#)

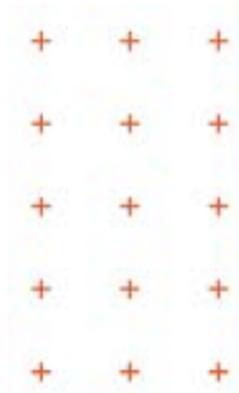
1. Hiring - Are we positioned to take advantage of talent that becomes available?
2. Employee development - What can we do to groom our personnel with training and development?
3. Market strategy - Where can we pivot and what new opportunities are available for us?
4. Acquisition - Are there any companies that we may pursue that would complement our offerings/business?
5. Contracts - What contracts could be renegotiated?

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"Change is inevitable. Growth is optional."

-John C. Maxwell



We've only included five questions for each phase in this e-book. For additional questions for consideration in each phase, [access our resource vault here](#). It's free. Do it!

**If you want one of our coaches to train you, attend a workshop.
It's the quickest way into the ring.
[Find Petra Coach Workshops HERE](#)**



What We Can Do For You

Our coaches – who have all successfully launched, scaled and exited businesses leveraging our specific methodology – will guide you and your organization beyond your stuck points to alignment, growth, scalability and purpose. Guaranteed.

Results You Can Expect

Organizations who work with us report:

- 92% of leadership teams have more time to work on their business rather than in it – they're no longer stuck in the day to day.
- 30% average increase in revenue.
- 26% increase in profits.

"You'd be better today if you started working with Petra Coach yesterday."

-David Waddell, CEO at Waddell and Associates, LLC

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