

# Day in the Life: Small Business



## DAY IN THE LIFE: SMALL BUSINESS

Jamie Merritt looked in the mirror and noted with satisfaction that her shoes matched...each other. She had been known to rush out the door and realize too late that two different heel heights would mean going through the day lopsided. As founder and president of Merit Events, she considered the occasional off-balance day a reasonable trade off for the frenzied but highly satisfying life she had built. Today, however, she needed her equilibrium.

Merit Events was a success by almost any measure. It was the realization of a long-held dream for Jamie. Merit could not only help stage company events, sales meetings and product launches, it could also surround the event with creative online marketing, webcasts and high-energy video. Like any small business, however, Merit required relentless attention to ensure Jamie had the right staff to build their reputation for excellence, the right level of sales to keep that staff busy (and meet payroll!), the right type of jobs to keep the company focused on its strengths and the right technology at the right time to keep clients and staff connected and engaged.

Jamie had painfully turned down work in the past that paid too little or took the company in what she felt to be the wrong direction. Her instincts had paid off so far but now a new challenge loomed. At 12:00 today, Merit Events would be presenting its proposal for the most important job in the company's five-year history.

IdeaBldr, a local venture-funded technology incubator had requested proposals for the company's first product launch event. Lavish, venture-funded launch parties mostly disappeared after the dot-com crash but a few companies, like IdeaBldr will still spend money if the vendor can demonstrate enough value. It is exactly the kind of work at which Merit excels. This job could power the type of strategic growth Jamie has been working towards for five years.

She will be competing against her former employer, Big Deal productions. Big Deal is the dominant player in the corporate events space and routinely handles huge events but they can be slow to pick up on new technology or solutions. In fact, it was Jamie's frustration with this



The featured characters and company in this piece are fictional. However, the features and capabilities of Avaya IP Office are fair representations of the product.



slowness that finally pushed her to start her own company. Jamie’s husband, Ryan, describes Jamie’s tenure at Big Deal as, “the irresistible force meets the immovable object.” (Ryan is an engineer.) Even so, Big Deal’s long history and impressive client list make them a formidable competitor. They have also recognized Merit as a growing threat and taken to throwing out ridiculously low bids to keep Jamie away from key clients.

Jamie’s day begins at 5:30 am because she has small children who sadly fail to understand the value of a well-rested mother.

- 5:30 am: Brandon, Jamie’s 5-year-old son appears at the edge of the bed to request Jamie’s iPad. He wishes to play “hamster trail”. Jamie, who does not believe in pacifying children with technology, resists for about twenty seconds. Principles are no match for the lure of an extra thirty minutes of sleep, however, and Jamie hands it over.
- 6:45 am: Jamie leaves for work with her laptop and sticky iPad (and matching shoes!). Ryan, will get Brandon and Micah to kindergarten and preschool, respectively before logging on to his job from his home office.
- 7:15 am: Jamie arrives at the office and immediately checks the office call records in Avaya IP Office. She notices that Austin Shueman called the main office after she left work but did not leave a message. Austin is a well-regarded event designer, whose presence on Jamie’s team would be a huge boost to her IdeaBldr proposal. Austin was on the verge of joining her firm several weeks ago but has been out of touch recently. His wife has had medical issues and Austin had let Jamie know he would be unavailable for a time so that he could focus on her. Jamie respects this but is encouraged that he called. Perhaps he is ready to commit! With her Avaya IP Office system, she has an email plug-in that lets her federate presence with all her key contacts – both internal and external to her business. Austin is not online yet, but once he is Jamie will be instantly notified. She will then be able to “pounce” on Austin by clicking to call, chat or e-mail.
- 7:30 am: Jamie meets with her financial advisor, Jim Tierney, to review their cash position and discuss some of their long-term plans. Jim tells Jamie that in order to increase Merit’s line of credit the bank wants to see stronger receivables. Jamie and Jim both know the IdeaBldr job would put them over the top.



- Jim: “How confident are you that you can land it?”
- Jamie: “I feel pretty good about it. Big Deal productions will underbid us for sure, but I think we have a much stronger plan.”
- Jim: “If you know they plan to underbid you, shouldn’t you try to match their bid?”
- Jamie reiterates her position. She believes Big Deal has been low balling bids and then making it up by labeling minor requests as “change orders”. She thinks she can land the job fairly and profitably but agrees to review the numbers to ensure her bid is as tight as possible.
- 8:00 am: Jamie calls her lead project manager, Marissa, with a question about her estimates. Marissa is onsite at the Hyatt. Thanks to IP Office, Jamie can quickly reach anyone on her staff simply by dialing his or her work number. Marissa’s cell phone rings with Jamie’s call and she picks up. She offers to review her numbers and call back within an hour.
- 8:30 am: Ryan calls. He knows Jamie has a big presentation today but he has a critical deadline to meet as well. The school nurse called to say Brandon is sick. They negotiate. Jamie will pick up Brandon from school and bring him home. Ryan will take care of him while continuing to work from home as much as possible.



**8:45 am:** Marissa calls with an answer to Jamie’s question on costs. Knowing she would be out, Jamie used IP Office to redirect calls from Marissa’s number to Jim. Jim collects the information, follows up with a couple of questions and then places his notes on Jamie’s desk.

As Jamie approaches the nurse’s office at her son’s school, her phone rings. Jamie maintains a short list of preferred callers in IP Office. Betsy from IdeaBldr is on that list. No matter what number Betsy dials she is routed directly to whichever phone Jamie happens to be using.

**9:00 am:** Betsy asks Jamie to reschedule the presentation from 12:00 to 2:00 pm. Jamie agrees. She hangs up and notifies her team of the change.

**9:15 am:** Jamie checks on Brandon. Fortunately he is fine. He has severe performance anxiety. A substitute had asked him to recite the alphabet in front of the class without realizing the drama that would ensue. The nurse is not worried. Brandon calms down and returns to class.

**9:50 am:** Jamie is back in the office. She calls for a team meeting at 11:00.

**10:00 am:** IP Office notifies Jamie that Austin is available by phone or chat. She clicks the phone link and IP Office completes the call.

*Jamie: “Hi Austin, how is your wife?”*

*Austin: “Much Better. Thanks for asking. She came home yesterday. She needs a few weeks at home to recover but she’s going to be fine. I have been giving a lot of thought to your offer. We had talked about the opportunity for me to work from home. If you are good with that for at least the next several weeks, I would love to join your firm.”*

*Jamie: “I’m so glad to hear she’s doing better! Of course you can work from home! We have several employees and contractors who work from home full time. As soon as we set you up with IP Office, you will be able to access the network and phone system as easily from home as you could from the office. That is not an issue at all!”*

*Austin: “That’s what I had heard. I’ve had a couple of other offers but I really like the work you are doing at Merit and you have, by far, the most flexible options of any company I’ve ever worked with. It’s impressive for a company of any size, but especially for a smaller firm like yours.”*

**11:00 am:** The team meeting: Jamie is in the conference room with one of her project managers and her video production specialist. Austin appears on a large monitor in the conference room along with Sandeep and Kaitlyn who are also video conferencing from their home offices. Jamie introduces Austin and lets the team know he has agreed to join them. They review the presentation. Austin is concerned that Merit does not have a project demo showcasing the right style.

*Austin: “Betsy is going to look at what you have done not what you say you can do.”*

*Kaitlyn: “I agree. Unfortunately, we don’t have any projects in our portfolio that exactly match what she is seeking.”*



Austin suggests pulling together a quick mash up of past projects using the edgy style they know Ideabildr wants.

11:15 am: A call from Ideabildr rings through on Jamie’s cell.

Amber: *“Hi Jamie, This is Amber. I’m the receptionist at Ideabildr. I just wanted to be sure your entire team knows about the schedule change.”*

Jamie: *“Hi Amber. Is there a problem? We are all planning to be there at 2:00. Everyone is on the same page.”*

Amber: *“Good to hear. Big Deal apparently was not able to reach everyone. Two of their people showed up at 10:45 and insisted on being allowed into the conference room to set up. I had to call Dan Bolder and have him tell them to come back at 1:00. We have investors here and I did not want to be distracted again.”*

Jamie: *“Wow. What a pain. We have a pretty good communication system. I was able to reach everyone using my phone system’s broadcast feature. Everyone on my team confirmed the time change within 15 minutes of Betsy’s call. We’ll see you at 2:00. Good luck with your visitors!”*

11:30 am: Jamie stops by Jim’s office to discuss the final numbers for the bid. Jim pushes Jamie to cut her price even further. Jamie knows Jim has a point. She wants this job and all it means but she resists the idea of an at-cost or below-cost bid with every fiber of her being. She believes she can sell this one on value.

It is now noon. Jamie resists the urge to check on the progress of the new demo. She trusts her team and the change in schedule means she has time for a cherished ritual.

12:15 pm: Jamie stops by her daughter’s preschool for lunch. Her team knows how to reach her and Micah’s delighted smile brightens her entire day.

1:45 pm: Arrive at Ideabildr. Dan Bolder and his team are just leaving. Dan looks smug.

2:00 pm: Jamie and team run through the presentation. Jamie projects the demo on a large screen in the IdeaBildr conference room. Austin’s laptop is equipped with IP Office Video Softphone, so he is able to join in from home. He appears in a window in the corner of the screen.

2:45 pm: The team is still fielding questions from Ideabildr. Betsy is clearly impressed with their demo and overall plan, however, she mentions that Big Deal’s bid is half of Merit’s. Jamie feels like she has been punched in the stomach. Half! No wonder Dan looked so smug. Jamie promises to work on the bid.

Jamie returns to the office and pulls up the proposal. She closes her office door and goes to work.

4:00 pm: Jamie submits a revised bid that is 20% lower than the original. It still includes some room for profit. She stresses the quality of her team, the 24/7 access (through IP Office), Merit’s past success pulling off complex events on tight schedules, innovative solutions, Austin’s fabulous portfolio, etc. She does not directly accuse Big Deal of low balling their bid, but she does carefully detail the comprehensive nature of her own proposal and suggests Betsy confirm that Big Deal is equally inclusive.

4:30 pm: Betsy calls. She is pleased with the new proposal. She tells Jamie that her proposal was exactly what she was hoping for and her price is on target. She will get back to her with the final decision in a couple of days. Jamie is thrilled. She knows Betsy will get input from her team but also that she is the final decision maker and, more importantly, that she has the budget authority to make the call.

4:45 pm: Jamie updates the entire team on their status.

5:30 pm: Jamie arrives home. Ryan has picked up kids and prepared dinner. Jamie takes over kid care while Ryan finishes his project. Jamie has set up her calls to go to voice mail after hours. Any calls that come in will show up on her cell at home with a text translation so she can keep tabs on any critical developments without having to interrupt a rousing game of Candy Land to dial in for messages.





# EPILOGUE

It took a week, but Betsy finally called Jamie to let her know they had the project. Her entire team had been impressed with Merit's presentation but a few had questioned the wisdom of selecting a higher bid from such a small agency. The final decision came down to three things:

1. The presence of Austin Shueman on the team.
2. The comprehensive and innovative nature of the proposal.
3. Jamie's responsiveness. Betsy had yet to leave a message for Jamie – all of their communications had been live. Big Deal often took several hours or longer to return calls. Knowing she could reach Jamie quickly when she had questions or concerns more than made up for Merit's smaller size and shorter client list.

IP Office played a direct role in each of Betsy's three decision points:

1. IP Office enables small business mobility. Jamie was able to convince Austin to work for her because she could offer complete flexibility while still getting the collaboration she needed from him. IP Office also enabled Jamie to reach Austin moments after he sat down at his desk and logged into to chat and his IP phone. She never had to waste time calling an empty house.
2. The combination of IP Office's mobility features and video phone conferencing means Jamie can draw on the talents of the best workers regardless of their physical location while maintaining a creative, collaborative environment.
3. Jamie was able to ensure Betsy could reach her in the office, at home, even at her child's school. IP Office allows Jamie to provide special handling to VIP clients like Betsy.

IP Office also allows Merit to offer non-VIP clients enhanced service in spite of her limited staff. Callers may not automatically ring through to the owner's phone, but IP Office does allow Merit to customize call handling based on any number of criteria, including the number dialed or even data pulled from Salesforce. Project managers can ensure clients and vendors on an active job ring through to them no matter where they happen to be. Plus all callers get round-the-clock response from smart phone agents that offer a far richer and more professional experience than simple voicemail.

In addition, Jamie was able to instantly communicate the change in the meeting schedule to her team no matter where they were. That type of reliable, instant communication allows Merit to present a more professional image and helps the team function as effectively and efficiently as possible.

Finally, while Jamie's natural business savvy, knack for hiring the right people, creativity and drive are huge factors in her success; her relentless focus on finding the right technology to power her company is a key as well. Avaya IP Office allows Merit to serve clients and pursue opportunities that might otherwise require a much larger staff.

Learn more about how Avaya IP Office can help your small business. Visit us at [www.avaya.com/small](http://www.avaya.com/small).



## About Avaya

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