

Marcus McEwen, CEO of Equivoice, shares the thinking and tools he used to transform an already successful company into a serious industry player, poised for greater, more sustainable growth.

By Marcus McEwen, February 2012

Entrepreneurial companies can get to a high level of success fuelled by smart people with great ideas, hard work and drive. But there comes a point when you have to do things in a significantly different way in order to grow and carry on thriving.

In January 2011 that's exactly where I was with Equivoice. We were a profitable company, with good products and talented people who were extremely loyal to me personally. But we were just not organised in a way that would support future growth and lacked consistent systems and processes. This often led to confusion and frustration among management and staff. I'd be able to overcome deficiencies by sheer power of personality, but some parts of the company were not as effective as others. And those underperforming parts were in truth draining the rest of the organisation.

When I first met Jonathan Wolf-Phillips of New Leadership Ltd, I was thinking about how I could make myself – never mind the company at this point – more effective.

So I and four of my team went through the initial personal effectiveness training and it had some positive effects for a while. But the benefits soon declined. With hindsight I see this was because I started to adapt and personalise it for my own use and failed to ensure others were sticking with the process and using it in the way Jonathan had taught us.

We stayed in touch. I even had a refresher session, but we didn't properly implement the system within Equivoice the first time around. Then came a wake up call.

We received an offer for a division of the company and we, the partners, made a decision to sell based purely on an emotional response. We saw a chance to rid ourselves of a problem – a part of the company that was difficult to manage because of our old disjointed management techniques.



Marcus McEwen CV

1996 to Present
CEO and Founder of Equivoice

1992 to 1996
Director of Service Bureau Sales
Prairie Systems

1989 to 1991
Director of Sales
Bell South Communication Systems

1986 to 1989
National Account Director
Ameritech Communications

1981 to 1985
Key account sales person for several
large phone companies

1981 MPA University of Miami

1978 BA University of Florida

Marcus has homes in Chicago and Miami Beach and runs an organic farm in Wisconsin that specialises in grass fed Mini Herefords and other small cattle breeds. His company, Equivoice, is a multimillion dollar leader in the deployment of converged IT networks and shared services.

www.equivoice.com

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Luckily for us, the sale failed to go through. I realised that we had come close to making a deal that made no rational sense and I didn't want to risk doing that again. I contacted Jonathan and said "Let's get your system back in place, but this time take it to a higher level and embed it 100% into Equivoice".

Phase one – clarity, transparency, accountability

Jonathan and I spent three days in London and we charted the history of the company and how people and responsibilities were organised. It became very clear to me what I needed to do and also how and why decisions that are emotionally driven end up being problematic.

I decided I had to be 'orthodox' in my use of the personal effectiveness system – because it is in fact a very well designed system and to make it work I just had to be disciplined and consistent and use it as Jonathan intended.

I then went back to Equivoice and told everyone that we were going to change the nature of our company. I wanted clarity, transparency and accountability. We were a multimillion dollar company with no standardised project management system, so at this point the work with Jonathan focused on project management, decision making and communication.

We developed a set of policies and procedures and implemented the new system throughout the company using a web-based collaboration system, which is a good fit in a high tech company like ours. It's now an integral part of the company. But it was painful for many. Total transparency reveals your flaws and there's no place to hide. But it cuts out all the finger pointing and the poor excuses. Now, if it isn't on our web-based system, then it hasn't happened as far as I'm concerned.

I have to say though that the web-based project management system is ideally complemented by the paper-based carry around compact binder system. Computer tools can be difficult to stick with but the binder is easy to carry around, making a 'to do' note is quick and easy as and when thoughts come to you, and you can update your computer based system at your leisure. In today's world and in our high tech environment, a paper-based tool gives your mind a break and is completely stress free to use with none of the user frustrations that sometimes come with computers and technology.

“My expense-to-revenue ratio is better now than it's ever been. I'm getting more done with less people and less hassle – and everyone's happier.”

About Equivoice

Headquartered in Chicago in the United States, **Equivoice** is an experienced leader in the deployment of converged IT networks and shared services.

They are specialists in the field of cloud computing where businesses access voice, data and video services and applications via the internet without the need to install or maintain the software and infrastructure themselves. It allows companies to get applications up and running faster and scale and adjust easily and rapidly to changing business demands.

Equivoice provide a Cisco Unified Communications Private Cloud Service Package that includes high quality, high speed access, Cisco Unified Communications services and a bridge between private and public cloud resources.

Based on a culture of 'expertise', **Equivoice's** approach is to understand the role of Unified Communications within their client's business environment, thereby ensuring that their solutions fully and effectively support and enhance business processes.

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Phase two – corporate ethos

In the second stage of the programme, this time three days in Edinburgh, Jonathan and I focused on developing a governance policy, a corporate constitution and a corporate ethos. And once again I brought all this back to Equivoice.

I’m an entrepreneur and the drive and vision that comes with that gets you so far, then you need to look at being a CEO and what that means – having the courage to change, lead and take your people with you. You need to look after the health of the company. Jonathan’s tools helped me clear out the clutter ... and allowed me to adapt my personality, become clear, more transparent, more accountable myself. It helps me prioritise – you can easily see when you’ve piled too much on your plate. So then you have to make decisions, sometimes difficult ones, about what gets done. It also shows when maybe you have to dial back your ambitions a little.

The whole process was one of personal understanding and transformation, then looking at how my company worked and re-organising that. You have to be open to ideas and looking at things differently – and be prepared to put yourself in a place where you can be fully focused on it. That’s why I choose to meet with Jonathan in the UK or Europe where from, say 8am – 3pm, I can fully concentrate, free from the distraction of what might be brewing up back in the US.

The results – eight months on

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i) People

What I really like about Jonathan’s system is that it makes people think – it’s a thought transformation process. Yes, it’s ‘personal effectiveness’ but at a very high level. It heightens your awareness and you become a much better thinker and problem solver. You begin to see why you’re doing what you’re doing, why other people are doing what they’re doing, and how you can get them to the place you need them to be.

For instance, some people have issues with ‘conforming’. So I now use this analogy. If you’re an air traffic controller, you have a checklist. The checklist is not about you personally or your ability or your initiative. It’s just there to stop the aeroplane from crashing. If I’m asking you to do something according to a set of routines, there’s a purpose to it. If you think something’s wrong then you need to come back with a logical explanation and say why we need to change it. What’s not an option is simply to ignore or fail to do something just because you dislike being told what to do.

I’ve got one guy who’s been through this process and he’s one of my key employees now – extremely effective. So, Jonathan’s tools has given me a series of effective people management methods.



ii) Process

We've also recently passed the Cisco audit for their 'Managed Channel Service Partner' programme. They were really impressed with our project management and collaboration system. To me that's hugely significant – it marks a transition for Equivoice and means we're now a serious player in the industry. For us, it's the recognition of our achievement – we've crossed the threshold to another level. And there's a hard dollar amount attached to it too – it means we get access to Cisco's high quality cloud products, higher discounts and more marketing money. It was Jonathan's approach to organisational development that got us the result.

iii) Profit

One of my Key Performance Indicators is my expense-to-revenue ratio and it's better now than it's ever been. I'm getting more done with less people and less hassle – and everyone's happier. In one division we went from a \$100,000 loss to a \$600,000 profit in six months. All because we used Jonathan's tools.

About New Leadership

New Leadership Ltd is a small international training and development company, specialising in taking a capacity-building approach to improving the effectiveness of leaders and their senior teams. The company was founded in 1999 by Jonathan Wolf-Phillips, after a career working in the IT industry (in the UK and Europe).

All the company's work is based on a competency framework and interdisciplinary theoretical underpinning, developed and applied in a wide variety of private, public and civil society settings over the last 20 years. The company's work is delivered by Jonathan Wolf-Phillips, through the following four fully integrated training and development programmes:

- Personal Effectiveness (1-to-1 training)
- Team Effectiveness (group training)
- Organisational Development (group facilitation)
- Personal Development (1-to-1 facilitation)

Keeping it going

Jonathan's ongoing support ensures we maintain all our new systems and practices. It's the organisational equivalent of having a personal trainer – keeping all our good habits going and staying on top of best practice. Circumstances change all the time, so I can get in touch quickly and get valuable input which helps me keep things moving forward. And it's a two-way exchange, because Jonathan sends me all the relevant and latest thinking from his vast learning resource base which we discuss and debate. The insights I gain are invaluable in continuing to steer Equivoice in the next phase of development.

Jonathan's really easy to work with, but the actual process you go through is hard work and not to be approached lightly. It's not a quick fix, it's a long term commitment. And it's painful - but I continued with it because I saw the value, right from the start. As it's an ongoing process, it gives you a framework for always moving yourself and your company forward to the next level. You just need trust, courage, and persistence – and be willing to adapt and change.

Related case study: Marcus McEwen explains why he chose to undertake the Personal Ethos Process, how this has changed the way he processes the world around him, and the impact it has had on his personal effectiveness. June 2013

Marcus McEwen: marcus@equivoice.com +1 (847) 235 3312 www.equivoice.com

Jonathan Wolf-Phillips: jonathan@new-leadership.com + 44 (0) 7971 561749

Jonathan's LinkedIn profile: <http://uk.linkedin.com/in/jonathanwolfphillips>