

Turbo Leadership Systems™

The **TURBO** **Charger**

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To our clients and friends

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New Purchase Order System



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Be An Active Listener

Lisa, corporate finance director for a commercial heating and air conditioning service contractor, told Session 8 of Turbo's Leadership Development Lab (LDL):

"Our Operations Department spends many hours each month filling out two-part purchase orders for monthly PM filter and belt orders. For job costing purposes, each job requires a separate purchase order number, even if the filters are all coming from the same vendor. The process includes filling out the order with customer name, agreement number, system generated work order number, quantity and sizes of each belt and filter, and price. Then the main purchase order goes to the vendor, and a copy goes to accounts payable to be matched to an invoice for payment.

"A bright young lady in our Longview office came up with a better way. When she called me to talk about it, my initial reaction was, 'It will never work.' Instead of blurting that out, I decided that I would practice my newly found skill of being an active listener, rather than shooting her idea down from the start.

"As I listened to her, I realized what a great idea she had! Basically, she created an Excel mail merge document where she logs a purchase order number, the customer name and agreement number, system-generated work order number, and the cost. She then opens up a Word mail merge document that pulls the information from the Excel document and populates the necessary fields. This Word document now replaces the two-part purchase order we typically use, and can now be easily emailed from her desktop without having to be scanned into the computer first.

"Her excitement was contagious-she thought she had it all figured out. As I continued to process through everything, I realized she had left out a step

that is of vital importance to the accounting department-an easy way of obtaining a copy of the purchase order, in case the copy that is supposed to go to accounts payable gets lost. I told her I thought her idea was great, then I asked her what her plan was for keeping copies. There was silence for a moment, and then she said, 'Oops, I didn't even think about that.' I explained to her why it was so important, and suggested she put further thought into it. Lastly I asked her to do a 'trial run' for her office, before we launch it to the rest of our offices.

"Long story short, the purchase orders will be centrally stored electronically. As for the trial run, purchase orders for belts and filters for scheduled maintenance agreements in the month of December were generated in mid-November, sent to the vendors, then forwarded to accounts payable for payment. All signs point to a job very well done by her!

"The lesson I learned from this experience is that the younger generation have active imaginations that blend well with technology. I need to be willing to be a sounding board, and then let them run with their ideas.

"The action I call you to take is be an active listener, ask questions, then allow your team the freedom to implement their ideas. The benefit you will gain is a motivated, engaged team."

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[Leadership Development Labs \(LDL\)](#)

in Beaverton and Wilsonville, OR!

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