



Facilitated Strategic Business Planning Program – delivered by Corporate Value Metrics

Session 1 – Part A. - Introduction to the VOP Strategic Planning Program

During the introduction, we cover overall objectives of the program, a general overview of the individual sessions, responsibilities and expectations of all involved, timing and scheduling, etc. During the introduction, each member of management is assigned a section of the business plan to draft as we complete the related session, including drafting the executive summary after all sections have been finalized. During each session, in addition to discussing the topics below, we incorporate the weaknesses identified through the VOP process into the development of tactics and action steps to be initiated.

Part B. - SWOT analysis

In this classic SWOT analysis, we facilitate a discussion of the Company's Strengths, Weaknesses, Opportunities, and Threats, as viewed by the various members of management. The objective is to begin to establish alignment among management as to the Company's current competitive position, and to begin to form the foundation of the Company's future direction. We discuss internal and external factors that drive or impede competitive advantages in the marketplace, and settle on the 3 or 4 most significant factors in each quadrant that will be our focus going forward.

Session 2 – Mission and Vision

We review the attributes of effective mission and vision statements and facilitate a dialogue to either review the Company's existing mission and vision statements (if they exist), or to develop new ones. We also tie the mission and vision statements back to the SWOT analysis to ensure that we are building a cohesive foundation for future growth.

Session 3 – Objectives

We define and discuss the Company's market, analyze the Company's customers and competitors, relate the information back to the SWOT analysis, Mission, and Vision, discuss short-term and long-term objectives for the Company, and settle on a short list of objectives that comply with certain filters that we will utilize.

Session 4 – Core Strategy

We define and discuss the Company's products and strategic roadmap, in the context of several different frameworks, including the Value Disciplines Model, the Ansoff Matrix, VMOST analysis and Blue Ocean Strategy. We link the ultimate combination of strategies back to results from prior sessions to ensure continued alignment.



Session 5 – Sales and Marketing

We define and discuss the Company's current practices in sales and marketing, including human and financial resources, structure, processes and strategies, how integrated they are, whether they are aligned with decisions from prior sessions, and what specific tactics and action steps should be undertaken within operations to advance the core strategy and objectives. We utilize several frameworks, including the Sales Funnel and Bowman's Clock.

Session 6 – Operations

We define and discuss the Company's current practices in operations, and what the operations of the future should look like in order to support the Company's overall strategies, objectives, mission and vision. We develop a specific list of tactics and action steps necessary to create the most effective operations possible, introducing a variety of frameworks, such as the Theory of Constraints and the Outsourcing Decision Matrix, among others.

Session 7 – Organization

We define and discuss the Company's current organizational structure, culture, and practices relating to recruiting, training, developing, and rewarding employees. We develop a specific list of tactics and action steps necessary for the organization to best support the Company's core strategies, objectives, mission and vision in the future. We introduce a variety of formal frameworks, including the McKinsey 7S model and Miles and Snow's Organizational Strategies, among others.

Session 8 – Finance and Accounting

We define and discuss the Company's current structure of finance and accounting and what attributes and specific tactics and action steps would be most needed in the future in order to support the Company's overall core strategy, objectives, mission and vision. We specifically discuss their nature, quantity, quality, and frequency of information that is utilized to manage the Company.

Session 9 – Executive Summary

We review the key components of all previous sessions, spending more time on any sections that need additional discussion or clarification. Sometimes, this session is used as a buffer to catch up with the schedule if previous sections are not all completed in one session. We also discuss the integration of all section drafts into a cohesive document, including editing them to reflect one common voice.

Session 10 – Measurement and Monitoring

We discuss how the new plan will be implemented from a project management standpoint. Who will be responsible to ensure the plan is executed? What will the management process entail? What other resources might be needed, if any, to execute specific initiative to report on progress? What key metrics will be measured along the way? Etc.



Session 11 – Document Review

The whole team has reviewed the draft sections of the entire plan at this point and we meet to review comments, suggested edits, etc.

Session 12 – Final Plan

The plan now reflects all suggested comments and edits and we meet for final review and wrap up. We also debrief about the overall process and discuss any implementation challenges that might need to be solved.

Course Description

Building a Successful Lean Team is an 8 hour course that delivers to managers and teams the knowledge of the characteristics, techniques, and methods of a building a successful Lean Team. The course provides the know-how for you to form and nurture successful work teams in your organization.

Learning Objectives:

Students will:

- Learn that teams are a critical component to a successful lean implementation
- Learn the nine characteristics of a highly effective team
- Learn how to facilitate the development of the nine characteristics
- Learn methods for nurturing effective teamwork

Course Topics:

- Establishing a Shared Purpose
- Creating Rules of the Road
- Clarifying Team Practices and Behaviors
- Conducting Effective Meetings
- Making Effective Decisions
- Confronting and Resolving Conflict
- Conducting Self Assessments and Correcting Problems



- Seeking Organizational Integration
- Celebrating Success