

# FOUR BUCKETS

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# REALIZATIONS OVER THE LAST WEEK

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1. No time for a Strategic Assessment
2. The roadmap is still relevant
3. Cannot afford to fly with empty seats
4. Vet prospects and sign them up to perpetual engagements

# RAPID START ON BOARDING

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Get the leader doing leadership things

Install a leadership team

Set priorities for 30-60 days

Start getting familiar with the numbers

Determine where the opportunities lie for a particular business

## **Rapid Start Strategic Assessment**

- We will begin to assess the strategic readiness of your organization and leadership team immediately, foregoing our standard due diligence process to begin working with your team on strategic housekeeping issues from the outset, including:
- Evaluate the cultural foundations of your organization and bring that information to the CEO for use in developing or improving Values, Vision, Why and Mission.
- Work with the Leadership Team to assess core accountabilities for each position on the org chart and direct reporting responsibilities and capacities for each team member.
- Review basic business processes and determine internal and external bottlenecks and process improvements as well as tools and practices that can improve workflows and leadership's effectiveness.
- Map the sales and marketing workflows and performance indicators that give insight into the real time performance of the company when identifying, recruiting, converting and retaining customers.
- Examine historic and recently developing financial trends and financial management practices that yield insight into the profitability and balance sheet health of the company.

# ENGAGEMENT SPECIFICS

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## **Strategic Planning, Execution and Coaching**

- We will work with the executive and the team to construct or improve the existing strategic plan foundation that articulates the Values, Vision, Why and Mission of the team.
  - Establish mid-range strategies in collaboration with the executive and the leadership team to give the organization sustained focus and parameters for setting annual goals and metrics to determine progress against the plan.
  - Budgeting through an annual process that includes financial modeling and forecasting tied to strategic plan goals
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- Quarterly operations evaluation to measure results against the strategic plan and set priorities by company and leadership team member for the next quarter
  - Monthly review of financial performance to address issues and hold leaders accountable to progress on projects that have been defined in light of quarterly priorities
  - Initial training and monitoring of weekly strategy sessions with the leadership team to ensure execution of the strategic plan
  - Development of an operations scorecard to be maintained weekly for the purpose of monitoring operations and predicting financial and operational variances from plan
  - Development of a financial dashboard to chart monthly financial results and long term trends against strategic plan goals and financial indicators of progress.
  - Periodic check-ins with leaders to monitor progress and update issues that may need attention by the broader leadership team.

# ENGAGEMENT SPECIFICS

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## **Leadership Team Development**

- Organization wide semi-annual culture surveys to measure engagement and professional development opportunities for the leadership team and benchmark company culture and engagement.
- Individual 360 review for each leadership team member and a personal training needs analysis based on feedback from peers, supervisors, direct reports and others included in the survey group.
- Personalized coaching and feedback on the progress of 90 day priorities and managerial effectiveness.
- Group training on the basis of training needs highlighted in the culture survey training needs analysis.

## **Executive Development and Coaching**

- **Monthly Pre-Brief/De-Brief:** Once per month we will begin 30-60 minutes early with the CEO to review our frank assessment of where the team stands in its execution of the strategic plan and what challenges are presenting themselves within the leadership team. We will work through the CEO's goals for the team and measure progress since the last meeting.
- **Mid-Month Review of Executive Priorities:** Once per month we will schedule a separate one-on-one with the CEO, (usually over a meal but also available virtually) to follow up on executive priorities, time management, leadership team issues and the specific action steps due for completion of the COE's main objectives for the quarter.
- **Personal Coaching Based on Observation and Training Needs Analysis:** We will work directly with the CEO on a personal long-term professional development plan and coaching schedule, taking direction from the training needs analysis derived from an expanded 360 Review to include family and outside professional peers.

# ENGAGEMENT SPECIFICS

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## **PROFESSIONAL SERVICES INVESTMENT**

Strategic Planning, Execution and Coaching		\$5,925 per month
Leadership Team Development	additional	\$2,385 per month
Executive Development	additional	\$1,845 per month