

# MASTER PLAN

## FOR A HIGH PERFORMING BUSINESS

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### **Plan -Failing to plan is planning to fail**

- Clarify Vision and Mission (You can't get there if you don't know where you are and where you are going.)
- Write S.M.A.R.T. goals with projected financial statements
- Create strategic plan for achieving goals
- Create clear action plans with specific assignments & timelines

2

### **Design the Organization for Optimal Performance**

- Structure organization to match functional needs
- Match employee talent with the demands of each job
- Create effective job descriptions with Key Performance Indicators (KPIs)
- Ensure that each team member has the opportunity to contribute at their highest potential
- Install efficient systems and methods

3

### **Build Quality Teams in a High Value Company Culture**

- Recruit quality employees
- Develop/manage star performers
- Coordinate and align individuals into effective teams
- Require accountability and commitment throughout the organization
- Clarify company values and establish/reinforce employee alignment
- Require and train employees to demonstrate emotional intelligence
- Develop and utilize employee retention program
- Encourage team members to take care of themselves and have fun on the job and in life

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### **Create Effective Leadership to Manage Performance**

- Ensure that every supervisor has the ability to effectively manage people
- Train in effective supervisory dialogue about expectations/work details
- Delegate and supervise effectively using the Art & Science of Supervision
- Train leaders in effective Management Meeting Processes
- Motivate through incentive plans and addressing individual needs
- Coach-up or coach-out employees based on performance
- Elevate leaders to work on the company rather than in the company
- Follow performance management principles in #5 below for all depts.

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### Install and Manage Sales Management System

- Ensure Sales Manager has the ability to manage a sales force
- Train Sales Manager(s) in effective sales management practices
- Recruit and train true "hunters" for sales reps
- Set clear individual and team salesgoals
- Train sales staff in proven processes and methods including effective listening and the art and science of closing
- Follow up - The fortune is in the follow up
- Leverage technology for lead generation and CRM
- Require quality customer service
- Take proactive market-driven action

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### Collaborate, Monitor and Problem Solve

- Build collaboration & knowledge integration throughout company
- Develop and utilize a transparent, collaborative monitoring system
- Manage a continuous quality improvement program with KPI metrics
- Install proactive problem solving system
- Utilize technology wherever possible to improve efficiency and accuracy

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### Know Your Numbers

- Be savvy in Management Accounting – don't leave understanding the numbers to someone else
- Include all "hidden" costs in pricing/estimating models
- Budget profit as an expense and do regular budget variance analysis
- Produce regular, accurate & complete numbers for Sales, Operations, and Accounting
- Measure efficiency with specific KPIs
- Take targeted actions based on the numbers to increase profit
- Manage Cash Flow; Stop Profit Leaks, Do Cost Analysis

**YOU'VE GOT THE PLAN.**

**Now Find What's Really Holding Your Business Back.**