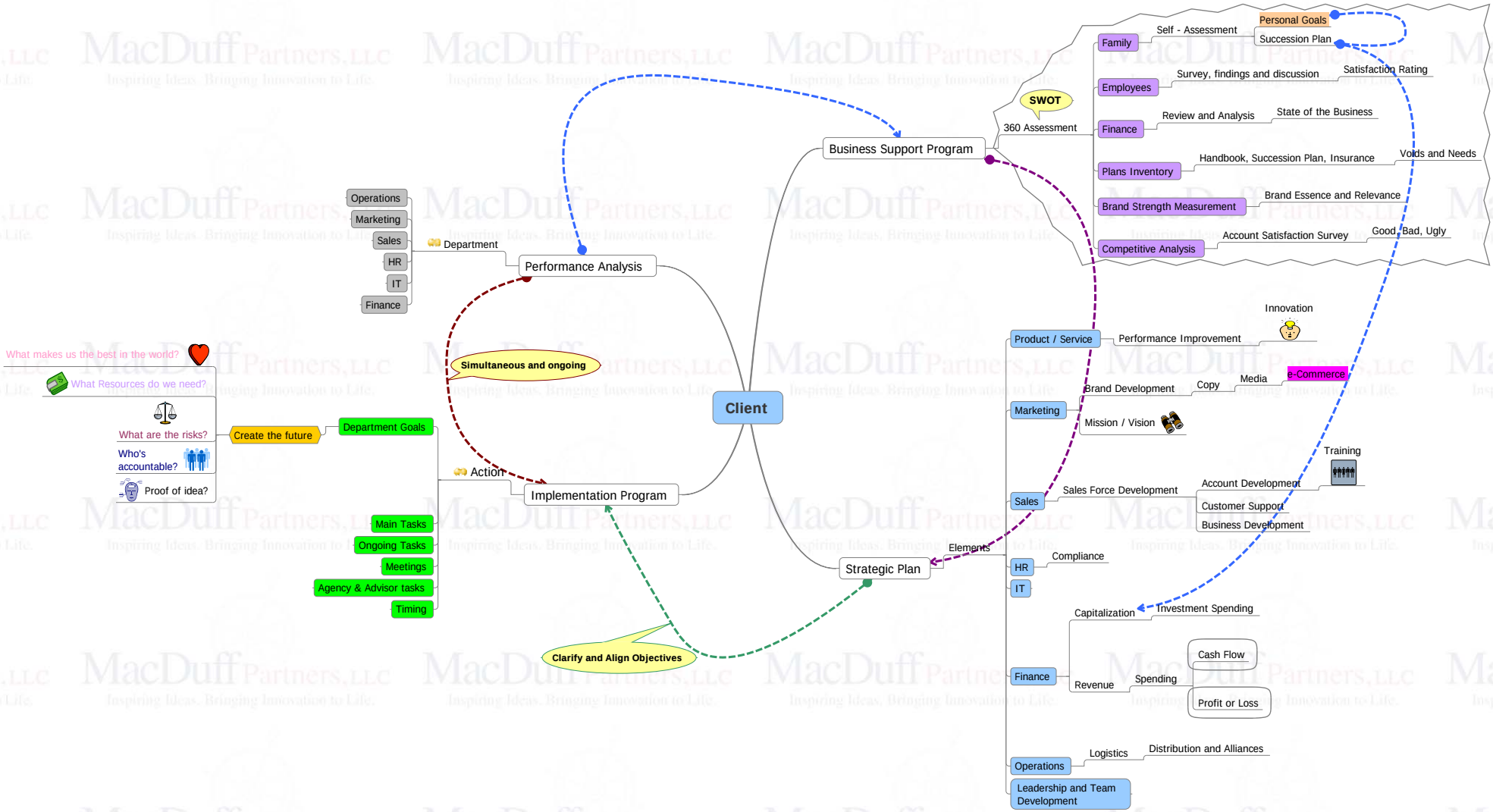
Client
Business Support Program
360 Assessment
SWOT
Family
Self - Assessment
Personal Goals
Succession Plan
Employees
Survey, findings and discussion
Satisfaction Rating
Finance
Review and Analysis
State of the Business
Plans Inventory
Handbook, Succession Plan, Insurance
Voids and Needs
Brand Strength Measurement
Brand Essence and Relevance
Competitive Analysis
Account Satisfaction Survey
Good, Bad, Ugly
Performance Analysis
Department
Operations
Marketing
Sales
HR
IT
Finance
Simultaneous and ongoing
Implementation Program
Action
Department Goals
Create the future
What makes us the best in the world?
What Resources do we need?
What are the risks?
Who's accountable?
Proof of idea?
Main Tasks
Ongoing Tasks
Meetings
Agency & Advisor tasks
Timing
Clarify and Align Objectives
Strategic Plan
Elements
Product / Service
Performance Improvement
Innovation
Marketing
Brand Development
Copy
Media
e-Commerce
Mission / Vision
Sales
Sales Force Development
Account Development
Training
Customer Support
Business Development
HR
Compliance
IT
Finance
Capitalization
Investment Spending
Revenue
Spending
Cash Flow
Profit or Loss
Operations
Logistics
Distribution and Alliances
Leadership and Team Development