

Mission: Empowering Small Business Owner's Next Steps

While we live in a world with information at our fingertips, knowing *what* to do doesn't always transfer to *how* to do it. We offer an outside perspective to validate the *what* and then offer the tools on *how* to get there. Often, the answers to our most important questions may be "simple," but they are rarely "easy." it's the "getting there" that needs help and that's where we can assist you and your team.

Who can we assist?

- ❖ Businesses that have stalled from lost competitiveness or slowing internal momentum.
- ❖ Businesses in declining markets and lacking business development focus and capabilities.
- ❖ Entrepreneurs/Owners wanting to scale but unsure of their next steps.
- ❖ Entrepreneurs/Owners contemplating a potential exit and wanting to maximize pre-exit value.

How we assist and What we deliver

Business Assessment: (Comprehensive review of Competitive Position and Capabilities)

- ✓ Defining external/internal strengths and opportunities across the Business including Customers and Markets, Sales and Marketing, Manufacturing and Supply Chain, Internal Operations, Organization and Culture, and Financial Performance and Structure.
- ✓ Assessment of the current Business capabilities alignment to the Vision and Long-term objectives.
- ✓ Agreement on prioritization of Strategies and expected Outcomes and proposed **SOLUTIONS**.

Business Optimization: (Implementing **SOLUTIONS** to **TRANSFORM** the business.

- ✓ Horizon planning and product/service roadmaps that support the Long-term vision.
- ✓ Cascading Planning tools that ensure strategies are executable against near and long-term goals.
- ✓ Developing an Operating Playbook (that defines a business management system of processes required to define the "what" (specific deliverables), and the "how" (completing work to satisfaction).
- ✓ Frameworks for GROWTH including
 - **GROWTH** capabilities -> Sales Process and Mgt., Business Development, Scaling
 - **Customer Intimacy** -> Relationship Management, Strategic Account Planning
 - **Talent Development/Engagement** -> Leadership and Competency Training; Accountabilities
 - **Operational Excellence** -> Mfg. Processes, Quality Systems, Safety, Continuous Improvement
 - **Financial Management**-> investment and working capital, P&L and cash-flow management

How we engage : starts with an introductory/complementary call/visit to determine if CGS can assist.

- **Business Assessment** → Structured Initial Project
- **Business Optimization** → **Business coaching and/or Advising – Fractional C-Level** - Monthly retainer

Contact us at:

- info@carlsongrowthstrategies.com
- pete@carlsongrowthstrategies.com

Pete M. Carlson
Principal
Carlson Growth Strategies

