

**>85% of Successful small companies in growth mode have implemented disciplined processes in four core strategic areas of the business.**

- Defining a “winning” competitive strategy.
- Horizon planning for growth with clear near-term alignment on strategies.
- Metric management of the business against goals/targets.
- Creating a “growth culture” including competency/skill development.

## 3 Week FAST START Business Assessment: 80 Hr. Deep Dive Review

**STEP I: ASSESSMENT** Through *Interviews* and *Direct Observation* the following items are reviewed at a high level against the Companies stated goals both near-term and for intended growth.

Aligned with Goals; Operating at parity or better	Not Aligned – Gap in support of Strategic Goals
---------------------------------------------------	-------------------------------------------------

Example Summary Below: Supporting Documentation is provided within each Strategic Area

### MARKET COMPETITIVENESS

Strength of value Proposition - Differentiation
Market Potential (Core-Adjacencies)
Customer Mix – Concentration – Market Risk
Sales Capability/Capacity/Close Value Capture
Bus Development – Lead Generation
Customer Satisfaction – Retention – Service Innovation
Brand Development – Marketing Life Cycle

### OPERATIONS CAPABILITIES

Systems / Scalability
Data Management
Commitment to Service Excellence
Project Management
Manufacturing Expertise – Problem Solving
Supply Chain Management - Optimization
Flexibility / Responsiveness

### MANAGING THE BUSINESS

Planning Process: Strategic → Tactical
Execution: Metric Management - Accountable
Financial Processes: FPA and Treasury
Cash Management – Reporting and Controls
Ability to Advance Strategic Initiatives
Senior Leadership Team Effectiveness
Right People Right Seats

### ORGANIZATION and CULTURE

Pace/Commitment to Growth- Growth mindset?
Continuous Improvement
Cross-functional Team effectiveness
Employee-Management Discipline/Accountability
Leadership Depth – Talent Management
Depth at Critical Competencies/Skills
Employee Engagement / Satisfaction

### STEP II: LEADERSHIP REVIEW:

- ✓ Review Findings with Leadership Team: Refine/add/delete assessment findings; agreement on baseline.
- ✓ Assign High-medium-low to Gaps to prioritize. Define what good would look like to close Gap.
- ✓ Discuss next possible steps to close Gaps: Internally driven, CGS support, other 3<sup>rd</sup> party experts....

### CGS Support: Business Optimization: (Processes for TRANSFORMING the business forward)

- ✓ 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).
- ✓ Develop and deploy GROWTH FRAMEWORKS included below...
  - Strategic Planning → Cascading Planning Tools that drive consistent execution
  - GROWTH capabilities -> Sales Process and Mgt., Business Development, Scaling
  - Customer Intimacy -> Relationship Management, Strategic Account Planning
  - Operational -> Mfg. Processes, Quality Systems, Safety, Strong Teams
  - Talent Development/Engagement -> Employee, Manager, Leadership Training
  - Financial -> access to investment and working capital, self-funding
  - Continuous Improvement -> Innovation Processes, Measurement, Accountability

**Pete M. Carlson**

[carlsongrowthstrategies@gmail.com](mailto:carlsongrowthstrategies@gmail.com)

[320-444-6630](tel:320-444-6630)

