

Strategic Planning and Performance Optimization Services

Solution Provider owners and executives often wish to accelerate progress on two critical areas of value creation: strategic direction and the steps to attainment, and optimizing near-term operating performance.

Service Leadership provides an array of services to support these goals, which vary depending on the client's engagement style, timing of need and budget.

Ad Hoc Executive Coaching

We set time to talk (or you can just call) and we can discuss how to assess, prioritize and resolve them. Available by phone (hourly) or on-site (full days only, plus expenses).

Upside: small outlays of cash, little structure needed. Downside: unpredictable cost and time to resolution.

Issue-Targeted Consulting

We together prioritize the issues and address one (or one by one) in small consulting engagements. Common issues: sales, technical and/or management compensation; service profitability and quality; expense management; sales forecasting; service offering design, development and maturation; strategic account management, organization and workflow, etc. This usually includes one to six months of follow-up phone sessions to remove obstacles and support progress.

Upside: more direct progress and predictable budget. Downside: bigger chunks of cash in shorter periods of time.

Strategic Assessment and Planning

Suitable when the goal is: "How do we maximize the company's value creation potential?" We evaluate all major aspects (target client profile, value proposition, go to market, sales and marketing model, organization and delivery structure, measurement and compensation, financial and operating performance) of the business to identify strengths and weaknesses, the extent of which may not now be fully known or appreciated.

We then plan for 3-5 year evolution and growth while immediately fixing obvious areas of need. The team implements the steps of 3-5 year plan, and we advise and monitor. This usually

includes three to twelve months of follow-up phone sessions to remove obstacles and support progress.

This method is also suitable for more immediate needs, such as a turn-around or responding to an extraordinary situation such as the win of a large account or integration of a new acquisition.

Upside: Highest likelihood of short term results and of reaching 3-5 year goals. Downside: largest budget in shortest term.

Proven Methods, Tailored Individually

In all three approaches, we use a simple, five-step approach:

1. What are the goals? What should they be?
2. What are the current situation and resources?
3. Develop strategy and tactics to meet the goals.
4. Support the successful execution of the strategy and tactics.
5. Monitor, respond and adjust as needed.

Obviously, the breadth, depth and tools used to accomplish these five steps vary considerably depending on which approach is used.

For the issue targeted consulting and the strategic assessment and planning, these steps are often contained in an engagement as follows:

1. Request a range of information from the client, and also perform a Comprehensive Diagnostic Benchmark[®] if the client has not yet done one with us.
 - a. This allows us to more quickly determine the current state of the company – the starting point, so to speak – with regards to financial performance, resources and capability, and customer base.
 - b. During our analysis of the requested information and the Comprehensive Diagnostic Benchmark[®], we typically interact with the client to clarify the information and refine the analysis.
2. Work with the management team to refine and clarify the strategic goals. We typically, although not always, accomplish this in a full-day on-site working session.
 - a. Often, “low hanging fruit” actions can be identified and put into action at this stage.
3. Develop a detailed, prioritized action plan in draft form which contains:
 - a. Financial plan and resources,
 - b. Steps to optimize financial and operational performance to ensure a solid foundation for the transformation,

- i. As noted above, these can be issue-targeted or can span the range of functions and activities in the company, including go-to-market, pricing, sales and marketing, delivery, account management, compensation plans, customer relationships and partners.
 - c. Steps to accomplishing the transformation,
 - i. These may span a range of functions and activities in the company.
 - d. The action plan is laid out in recommended sequence and priority and is typically 10-15 pages.
 4. We typically, although not always, visit the client for a full-day on-site working session to review our recommendations in the draft action plan and work together to assign dates and responsibilities for the management team.
 - a. Typically, the team fully engages in the action plan at this point.
 5. Within a week, we provide the final “for the record” calendarized action plan.
 6. Typically, monthly follow up calls of 90 minutes each are scheduled for three months to twelve months, to ensure the management team has the opportunity to call on Service Leadership to help clarify solutions or remove obstacles, and to enable tracking and ensure focusing of the client’s progress.

This method is tailored appropriately for the needs, style and budget of each client.