

CEO Strategy Group

Session 1: Successful Sales Planning

- I. Class Exercise: Flow Chart Existing Sales Processes
 - A. Include Milestones & Timelines
 - B. Must be “As Is” versus “Ideal”
- II. Ideal Sales Process Comparison
 - A. Measurement, Monitoring, & Quality Control
 - B. Refinements for Improvement
- III. Quantify Sales Processes
 - A. Target Market – aggregate demand
 - B. Lead Conversion to Sale
- IV. Sales Force Management Measured Plan of Attack
 - A. Development & Training
 - B. Monitoring Key Variables of Sales Activities
 - C. Recruiting New Sales Personnel
- V. Required Materials for Session 2

Session 2: Marketing Planning to Maximize Marketing ROI

- I. 1 or 2 Presenters for Session 1 Assignment Feedback
- II. Class Exercise: Documenting Lead Sources
 - A. Source Examples: referrals, trade shows, print advertisements, web page, etc.
 - B. Ask, “How did you hear about us?” at Initial Point of Contact
 1. Telephone – must record lead source
 2. Website – may or may not self-identify Total by Source
 - C. Total by Source
- III. Breakdown Marketing Budget by Lead Source
- IV. Compare respondents and sales conversion for Marketing ROI
- V. Utilizing Advertising, Public Relations & Social Media in Marketing
- VI. Required Materials for Session 3: Company Budget

Session 3: Financial Planning and Management for Business Growth

- I. 1 or 2 Presenters for Session 1 Assignment Feedback
- II. Financial Management
 - A. The 3 Financial Statements, making them meaningful for you
 1. Trenton Analysis
 2. Ratio Analysis
 3. Checks & Balances for Senior Management
 - B. Budgeting Tools & Techniques
 - C. Forecasting Cash Flow
 - D. Managing Cash
- III. Class Exercise: Financial Statement Controls & Analysis
- IV. Funding the Business
 - A. Debt
 - B. Equity
 - C. Cash Flow
 - D. Hybrid
- V. Required Materials for Session 4: Staffing Schedule, Organization Chart, Employee Manual

Session 4: Human capital planning for growth

- I. Presentations from Session 3 from Feedback
- II. Recruiting Tools & Techniques
- III. Employee Training & Development (formal vs. OJT)
- IV. Hiring & Firing Best Practices
- V. Human Resource Planning & Staffing
 - A. Organization Structure & Strategic Alignment
 - B. Staffing Techniques: FT, PT, Contractor, consultants, hybrid, etc.
- VI. In Class Exercise: Rating Employees & Managers
 - A. Individual Ratings of Employees & Managers
 - B. Payroll Lean Thinking Methods

Session 5: Operations Planning for growth and change

- I. Presentations from Session 4 for Feedback
- II. Growth Planning for Operations
 - A. Scenario Analysis to best match revenue and expenses for growth
 - B. Milestone-Driven Planning
 - C. Opportunity Matrix
- III. People
 - A. Resourcing: Number, Skills, Experience
 - B. Organization
- IV. Processes: operational inefficiencies -- correcting vs. work around
 - A. Best Practices (BP)/Continuous Improvement (CI)
 - B. Standard Operating Procedures (SOPs)
 - C. Lean/Six Sigma (L6S)
- V. Knowing When to Buy/Hire/Invest/Divest
- VI. In Class Exercise: Opportunity Matrix

Session 6: Strategy/Strategic Planning for growth and change

- I. Presentations from Session 5 for Feedback
- II. Strategy Development
 - A. Frameworks
 - B. SWOT (Strengths, Weaknesses, Opportunities, Threats)
- III. Strategic Planning
 - A. Value Proposition
 - B. Competitive Advantage
- IV. Strategy Execution
 - A. Planning, Implementation, Measurement, Revision
- V. Strategic Decision-Making
 - A. Scenario Planning
 - B. Rules of Thumb
- VI. In Class Exercise: Competitor Matrix

Program Requirements for Members:

- **Attendance** – must attend 4 of 6 on site sessions in one year
- **Participation** – willingness to present and share with class for constructive feedback
- **Prepayment** – members agree to prepay invoices quarterly
- **Session Assignments** – must complete session assignments between sessions
- **Instructor Collaboration** – must work with instructor between sessions to implement learning
- **Selling Discouraged** – Members are discouraged, but not prohibited, from doing business together; instructor disclosure needed
- **Termination** – Instructor has the right to remove a disruptive member from the group at the instructor's discretion for the benefit of the group
- **Membership Agreement** – Members agree to honor the program requirements for members