

Management Validation & Action Planning

Sample Company

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Engagement Date: 17-Sep-2001

Comment:

SAMPLE REPORT

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Key Objectives	Resource Allocation	Ownership	Milestones	Due Date	Measurements
Building Effective Teams					
Select top performing managers as mentors	Training & Development Group	Jane Thomason - Director of Training & Development <jthomason@linear.com>	Send e-mail to regional VPs to nominate mentors	10/04/2001	Substantial increase in Leadership 360 results on the part of the candidates Favorable response from candidate staff interviews Successful completion of action items on candidate personal development plan
			Mentor candidate nonimations due	10/12/2001	
			Mentors selected	10/19/2001	
Mentor managers to attend teambuilding train-the-trainers classes	External Training Company	Greg Hanson - Mgr of Training & Development	Select training company	10/02/2001	Same as above
			Develop training schedule	10/11/2001	
			Create course enrollment system	10/15/2001	
			Teambuilding course commences	10/30/2001	
Determine candidates for mentor program (to be paired with trained mentors)	Internal Resources	Ted Crane - Manager Human Resources <tcrane@linear.com>	Regional VP's to select candidates for program	10/09/2001	Same as above
			Candidate nominees due	10/16/2001	
			Schedule mentor/candidate introductory session	10/31/2001	
Establish performance metrics to be used to evaluate effectiveness of program		Greg Hanson	Identify key performance metrics	10/16/2001	Same as above
			Finalize and approve metrics	10/23/2001	
			Announce and implement metrics in conjunction with introductory session	10/31/2001	
Customer Profile					
Build profile database	Internal Resources with Consultants	Simone Charles - Director of Market Research <scharles@linear.com>	Organize project IPT	10/02/2001	30% increase in cross-sell products
			Set up necessary connectivity for group members	10/05/2001	
Conduct research/focus groups	Outsourced Research Company	Simone Charles - Director of Market Research <scharles@linear.com>	Select research company	10/02/2001	75% of better favorable response to new product offerings
			Set up focus group schedule	10/09/2001	
			Compile data from focus group	10/26/2001	
			Create reports and recommendations	10/30/2001	

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Customer Profile					
Link key learnings to marketing plan	Marketing Dept	Martin Langley - Executive Vice President of Marketing	Analyze focus group impact on marketing plan	11/02/2001	5% increase in direct mail responses
			Modify marketing plan to reflect impact	11/09/2001	
Structure Evolution					
Assess appropriateness of current organizational structure relative to current strategy		Jonathan Walker - President/CEO <jwalker@linear.com>	Collect company organization charts	10/03/2001	7% drop in G&A expenses
		Susan Robertson - SVP Human Resources <srobertson@linear.com>	Analyze span of control/workflow issues	10/09/2001	
Reorganize structure and reporting relationships as necessary	Internal Resources	Susan Robertson - SVP Human Resources <srobertson@linear.com>	Recommendations due	10/23/2001	20% increase in interdepartmental productivity
			Final changes implemented	11/30/2001	
Applied Technology					
Inventory current company technological environment	IT Staff	Donald Chang - EVP Information Systems <dchang@linear.com>	Select project team	10/05/2001	10% minimum save with redundant systems
			Complete inventory	10/30/2001	
			Create summary report	11/02/2001	
Research advancements in mainframe/PC technology	External Consultants	Richard Monahan - Director of Info Services	Hire Tech consultant	10/16/2001	35% reduction in hardware/software costs
			Attend Comdex Trade Show	11/16/2001	
Research advancements in Internet technology	Internet Consultant	Richard Monahan	Hire Internet consultant	10/16/2001	25% increase in website hit rate
			Attend Comdex Trade Show	11/16/2001	10% more visitor traction for online sales
Make recommendations to Executive Committee	IT Staff	Donald Chang - EVP Information Systems <dchang@linear.com>	Compile data from trade show/consultant research	11/30/2001	Acceptance and approval of Exec Committee
			Make presentation to Executive Committee	12/14/2001	Overall cost reduction of not less than 10% in annual IT costs
Adaptability to Change					
Create company-wide change management plan	Internal Resources with Change Mgmt Consulting Firm	Susan Robertson - SVP Human Resources <srobertson@linear.com>	Selct change management company	11/06/2001	Increase response time to industry changes
			Determine program criteria	11/13/2001	
			Approve and finalize program	11/16/2001	
Provide change management course for managers and supervisors	Change Mgmt Consulting Firm	Jane Thomason - Director of Training & Development <jthomason@linear.com>	Schedule Training classes	11/13/2001	Same as above
			Set up enrollment system	11/20/2001	