



## Operations Planning Business Rigor™ Series of Offerings

Business Rigor™ Operations Planning begins where Business Rigor Roadmap Building ends – with the approval of your company's strategic growth roadmap. It helps you master "blocking and tackling" so you meet the revenue goals outlined in your 36-month strategic plan. During Operations Planning, each Functional Owner develops a 12-month operating plan that includes the tasks, budgets, major milestones and metrics needed for the company to meet its financial objectives.

Operations Planning provides the methodology, planning templates and coaching needed to help Functional Owners detail their operation requirements. It also keeps them focused on the guidelines and boundaries in the strategic roadmap. As a company executive, you have a concrete understanding of what your team must do to grow the business. At the end of this 90-day process, you will also understand how to measure your team members against their execution progress.

Operations Planning includes three phases:

- Preparation
- Plan Development
- Management Reviews

### Preparation

Preparation is the foundation phase for Operations Planning. This phase begins with identifying Functional Owners. These individuals each own a component of the business, such as marketing (product, strategic alliances, promotion, and business strategy), sales (direct and indirect channels), operations, finance, IT or administration.

During this phase, a thorough explanation of the operations' planning process, templates and tools is provided. Your in-house project leader and your GAJ Services coach determine the project's schedule. The target timeframe for a completed process with approved plans is 90 days. Your GAJ Services coach is with you every step of the way – educating your team on the Business Rigor Operations Planning process and explaining the functionality of the 12-month operational plan templates.

### Plan Development

The Plan Development phase leverages the framework developed during Business Rigor Roadmap Building. At the end of this phase, you will have a solid 12-month plan, which includes financials, major milestones and metrics, to help you measure progress at regular intervals.

Plan Development is an iterative process that establishes the habit of refining detailed activities by continually asking, "What do we need to do to hit our 12-month target?" During this process, Functional Owners are encouraged to use creativity and to look beyond standard operating practices. Each Functional Owner fine-tunes his or her goals, measurable objectives and growth strategies. Each Functional Owner also details the initiatives and tasks required to accomplish each strategy.

One of the biggest challenges to successfully growing a business is making sure your entire organization is operating in sync. During Plan Development, GAJ Services guides your team through a one-day Cross-

Functional Conversation workshop that encourages communication between Functional Owners. The objectives of this session include:

- Identifying major company milestones
- Having all Functional Owners commit to the milestone dates
- Uncovering overlap between Functional Areas

This session resolves the challenge of coordinating activities, which can occur while each Functional Owner focuses on building his or her area's future operations plan. During this workshop, Functional Owners assume the responsibility of working out issues themselves instead of relying on the CEO to make decisions.

## **Management Reviews**

As with all GAJ Services' offerings, management reviews and buy-in are essential for success. GAJ Services encourages three management reviews during Operations Planning.

The first management review is a facilitated one-on-one meeting between each Functional Owner and the CFO or controller. This financial review takes place at about 45 days and is designed to catch early discrepancies between the company's strategic roadmap and the Functional Owner's plan.

The second management review is an examination of the initial draft of the operating plan. It takes place at the end of the first 60 days and includes a presentation of major milestones, required resources and metrics to the CEO.

Plan Development concludes with a final management review of the operating plans. After the final management review, Functional Owners are given a green light to execute their plans by hiring the resources they need, managing their plan against the accepted budget, and meeting their milestone deliverable commitments. Pretty ideal, isn't it?

It is now time to execute the plan.