



THE NUTS AND BOLTS FOR YOUR BUSINESS WORK PLAN

Moving from Ideas to Action

ABSTRACT

A complementary document to Nuts and Bolts to Mapping Your Business Future.

A self-development tool for Mapping Your Operational Plan© Richard P. Fontanie

Introduction

My companion document *Nuts and Bolts of Strategic Mapping* provides the framework for Strategic Planning. It highlights “how” to write statements for vision, mission, values, goals, key results and strategic initiatives. That document should be completed prior to working on this one. This document breaks out five critical areas, over and above strategy, to consider when you prepare an operational Plan.

The Operational plan is always aligned with the Strategic Plan. The Strategic Plan gives the overall direction of the organization or company. Without it, an operational plan becomes a ship in high seas without a North Star guiding the company. Often businesses and organizations are responding to their environment – I call it chasing rabbits (or fish) – with little and no knowledge of where they are heading. They are caught in a time warp, running from one crises to the next.

In these times when change occurs so rapidly it is important that businesses know where they are headed, otherwise any road (to use another analogy) will take you there. “Any road” may be the wrong road, take you to the wrong destination, and end up at a dead-end . To avoid this catastrophe, planning – both strategic and operational – is necessary. You can always take a detour on the road to success and return to the main road when the opportunity presents itself.

There are three primary elements to operational planning: 1) *Understanding needs* pertaining to your internal and external environment and how they relate to your strategic imperatives; 2) *Setting SMART objectives* to meet the needs and achieve the goals and initiatives you have set; 3) *Planning Actions* or projects, big and small, to achieve the objectives.



You may have completed the first element (the environmental scan) when you established your strategic imperatives. Now you are about to review the scan and link it to your operational plan. This often requires more specific information relative to five areas: Structure, People, Culture, Methods and Customers.

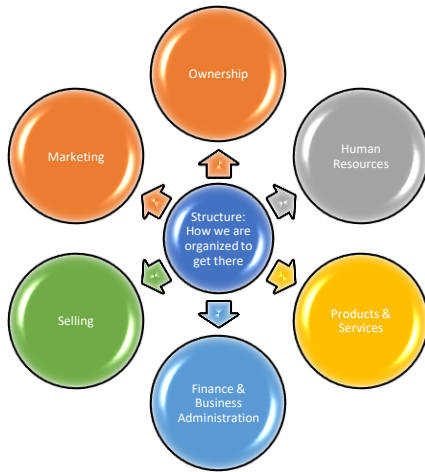
Structure relates to how you organize your business; *People* ensures you have the right people in the right place at the right time; *Culture* expresses how people relate to customers and to each other; *Methods* uncover the systems and processes you employ to support your operations; *Customers* are those who purchase your products or services, your relationship with them and the information you collect in order to serve them well.

It doesn't matter whether your business is small or a large corporate enterprise, these functions are the same. The major difference is that in a small business the planning and delivery falls on fewer people, and often on the owner and partner.

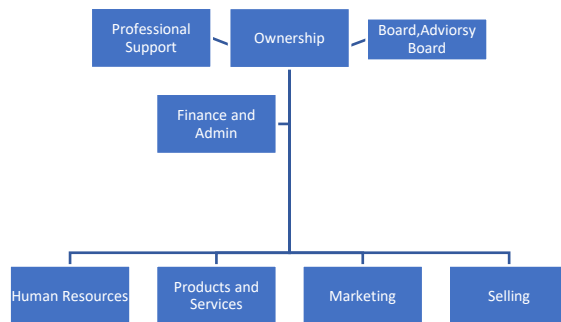
Richard Fontanie

STRUCTURE

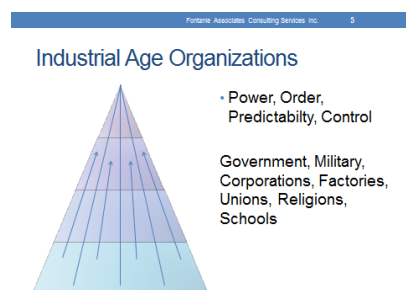
Structure is all about how your business is organized to deliver your products and services. There are six areas you want to ensure meet your requirements now and into the next three to five years. These are organized under six primary functions: *Ownership*, the legal framework, management structure, board or advisory board and professional supports to owners and managers such as lawyers, accountants, insurance agents and bankers; *Human Resources*, the reporting relationships, staffing levels and attendant requirements; *Products and Services*, all the products and services you offer to customers; *Finances and Business Administration*, the way your financial and administrative tracking systems are organized and structured; *Selling*, the methods and strategies you employ to sell your products and services; *Marketing*, the way you organize to teach your marketplace about your business, products and services. If your business also produces products you would include *manufacturing* as a functional area.



Structural Transitions



There are several ways in which structures are organized, but in today's world they are typically hierarchical or horizontal in nature. Many of the larger hierarchical businesses are moving towards or have already restructure to a more flexible and interactive structure centered around the business strategic imperatives. A typical hierarchical structure looks like the one the left. These structures are based on the industrial economy.



The Industrial Age Organizations, many of which still exist today, are designed to ensure *power, order, predictability and control*. They are efficient and designed to meet the demands of a mass production economy. They are structured in a way where obedience is linked to security, jobs are organized into segmented hierarchies or silos, tasks are made simple and are reproduced with maximum repetition, remuneration is made according to the type of job one has and workers are an extension of machines. Governments, military, large corporations, religions, schools, and unions were all designed this way.

During the 90's, because of the expansion and access to information through computerization, a new way of doing business emerged. Many industries adapted to this new reality and many more continue to search for this new path. Experience has shown that the larger the organization the more difficult it is to make the transition.

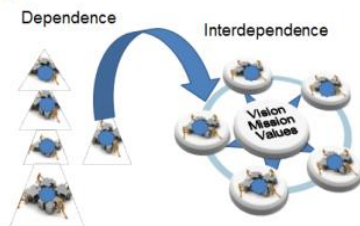
Information Age Organization



- Based on the theory of value
- Designed to engage, encourage creativity and constant improvement
- Control comes from the vision, mission, values and understanding corporate goals

The Information Age Organization is based on the “creativity theory of value.” It is designed to empower employees, encourage creativity and seek constant improvement. Control comes through an adherence to a common vision, a set of values and an understanding of corporate goals. The structure is horizontal (flatter) and functions are not in siloes. People who work in functional areas are expected to collaborate and coordinate their efforts across functional lines. This type of structure reduces the levels of management, requires strong teamwork but still requires job clarity. Many small businesses will say that this type of structure is the way they have always been organized.

Organization in Transition



In the industrial economy individuals found themselves inside the management structure. In the Information economy the management structure is inside the individual. Power, order and control, are found in an alignment with the common vision, values and goals. During the transition period, as organizations transform from one structure to the other, individuals move from the dependence upon the organization found in a highly visible pyramid, to more independence within the changing organization; and, end in an organization where the pyramid is in the shadow and people operate within interdependent teams.

Work has been with us for untold centuries, but it was only in the turn of the 20th Century that the study of work and how it is organized began in earnest. Frederick W. Taylor was the first person to study work, and much of the gains made in productivity are traced back to his theories of ‘scientific management’.

The basis for Taylor’s theories was embedded in the way work was done during his day. During his time the economy was driven by the industrial complex typified by the assembly line. However, most people today find work in what Dan Stamp, the former chairman of Priority Management an International Training and Development firm and Dr. Peter Honey, a world renowned Industrial Psychologist, called “*The Invisible Assembly Line.*” In these structures workers are known as knowledge workers. They deal with ideas, information, and people. It is estimated that over eighty per cent of workers are now classified as being in the service or knowledge sector of the present-day economy.

I have worked with over 1000 business covering all sectors of the economy and I cannot identify one that this not technologically wired in, internet friendly, WIFI connected. Trades people such as plumbers, electricians, duct cleaners, carpenters, furnace and refrigerator repair personnel (to name a few) all are supported by high technology, smart phones and tablets as are all professional including accounting, lawyers, health professionals, social workers and others. Knowledge workers also include all support personnel, customer service representatives, and office administrators. No one is exempt from the advancement and continuing advancement of technology.

Organizations will continue to be disrupted in the future as it is expected that thousands of jobs as we know them today will disappear by 2025-30. The good news is that old jobs will be replaced with new knowledge jobs. This is important information for owners and leaders of companies if they wish to survive the tsunami of pending change.

The new organization incorporates several cultural and structural changes including:

Leadership & Management	<ul style="list-style-type: none"> • Vision, Mission, Goals and strategies drive budgets and not the other way around • Strategy articulation is adaptive and responsive to customers and stakeholders rather than driven by programs and services • Leadership is situational rather than autocratic • The distinction between manager and those managed is diminished
Customers and Stakeholders	<ul style="list-style-type: none"> • Power comes from external relationships and customers • Focus is on customers and relationships which in turn drive profits • Programs and services are customized and refined by customers • Improvements around programs and services are customer-centric
People Within	<ul style="list-style-type: none"> • Human resources are recruited for competencies to find solutions rather than program expertise • Workforce is diverse rather than a homogenous • Individuals and teams are committed to common values, purpose and goals • Individuals and teams are respected, autonomous, empowered and engaged • Creativity and innovation is encouraged
Operations	<ul style="list-style-type: none"> • Greater number of communication/action channels are prevalent • Shift from vertical to horizontal and networks built on relationships, teams, and shared vision, mission, goals and values • Decision-making is decentralized where a balance between consent and discretion is accepted • Information architecture cuts across the enterprise and managed accordingly rather than managed functionally • Whatever can be automated, is automated • The organizational structure is fueled by independent and interdependent teams • Teams are networked around information and projects
Improvement	<ul style="list-style-type: none"> • The Learning organization is the way to progress and individuals are given room to make mistakes and learn from them • Constantly improving products, processes and people is the accepted norm

What do you need to change within your structure to meet emerging and long-term requirements?

People & Culture

The most important factor for your company/organization's success is to make sure you hire people with the qualities and competencies necessary for the job and that they "fit" within the culture of your organization.



Most leaders and managers know about the dire consequences when they have hired a person who doesn't fit. Your team or teams rely on people to do their jobs with excellence, commitment and accountability. Organizational and business leaders and managers owe it to themselves to hire people with the potential to grow into positions that will one day replace them. Here are six areas to review when considering your operational direction.

1. Job Descriptions. Write clear and concise job descriptions that outline work expected from the position. Then identify other hiring criteria including: experience, skills and

abilities, qualifications, personality requirements and "fit" expectations.

2. Roles and Responsibilities. These complement job description and outline the relationships the position has within the teams and with other teams; and their relationships with customers and stakeholders.

3. Hiring practices. To get the best qualified individual you need to take the time to search for the best. This is not only by maximizing internet job boards but also by maximizing your own automated social networks such as LinkedIn and Facebook and your face-to-face networks through business and community related associations.

Once the person is hired present the candidate with a current *Employee Handbook* that contains a company profile, and policies for the employment agreement, record keeping, performance evaluation, timekeeping and payroll, working conditions and hours, employee conduct and discipline, health and safety programs and employee benefit programs

Are you current on all *labour standards and regulations*? Are you ahead of the curve or aware of potential labour issues and policies, legal, regulatory or otherwise? Do you have an employee handbook?

4. Performance Management. Organizations have initiated several approaches to managing human performance. They have included: 1) *Performance Appraisals* – a Leader/Manager reviews an employees work, completes an annual appraisal form; rates the employee's performance, and sends the documents onto the person's personnel file. 2) A *Performance Management System* - an integrated approach to the appraisal process and includes the following four components: Planning, Coaching, Reviewing and Renewing.

More recently, organizations are evolving their Performance Management Systems approach to a method called *Performance Improvement Process*. Performance Improvement includes the four components above but incorporates learning and personal growth by connecting “who the person is” or their sense of purpose and career path with the mission and goals of the organization. Performance Improvement focuses on engaging people in finding a fit within the organization and contributing to the team and organization. It is more of a bottom-up approach to human performance than top-down.

What is your performance management system? Does it need improvement? If you don’t have one, what is your intention? How do you measure employee performance? Does your evaluations or performance processes include developmental requirements? How do you handle poor performance issues?

5. Organizational Culture. Your business culture is determined by the way people act within your organization. It is strategically determined by the values you promote and how those values are lived or practiced by everyone. Basically, the organizational culture is described as “how we do our work around here.” It should be one which motivates everyone to collectively work together as strong teams, and individually to perform to the best of their ability. How would you describe your culture? Are your business values written and promoted? Does everyone within the organization ascribe to the values? Do you need to conduct a values clarification process? Have you had “cultural climate studies” completed? What did they tell you? Do you need to complete a “cultural climate study”?

6. Learning. Learning can be described as self-learning, directed learning, and continuous learning. *Self-learning* occurs when people take ownership for their own learning. They see learning as an important value for their continued success and improvement. *Directed learning* occurs at two levels: a) An individual is directed or recommended to take a workshop, course or seminar to fill a skill or knowledge gap as determined by their performance. b) A collective workshop, seminar or course is offered by the company or organization because of a skill or knowledge gap by many within the company or organization. *Continuous learning* occurs when the business or organization views learning as a process and not an event. Everything is considered a learning opportunity including strengths and weaknesses. Continuous learning occurs during meetings, in coaching sessions and in round table conversations. It doesn’t preclude self-learning or directed learning but is inclusive of all learning.

Does your business/organization have skill or knowledge gaps that need to be bridged? Do you have a learning budget? How much do you set aside for specific learning needs? Does your performance system include the identification of individual learning needs? How do you fulfill them?

What do you need to change to meet your People and Cultural requirements?

CUSTOMERS

Customers come to you in two ways. The first and most obvious way is through your doors, the internet, emails and over the telephone. These are your coveted *external* customers. The second way, and not so obvious, is through your organization. They are employees. They are our *internal* customers including the boss, manager, team leader, and colleagues.

Customer Service simply refers to *managing all those points of exchange between the customer and the business*. These exchanges are often called “*moments of truth*”. They determine whether the customer will be pleased or not. So, every time someone meets an internal or external customer, customer service begins. The complete sequence of “*moments of truth*” – all those acts performed by those who contribute to the customer experience- become known as the full “*cycle of service*”.

Customer Service is all about managing all the “*moments of truth*” between your organization and the customer which determine “whether the customer will be delighted or not.” Today customer service is more important than ever because customers:

- Are more discerning in their choice of service as well as product
- Want quality
- Have ever expanding expectations
- Will go where their needs are met
- Want personal touch
- Seek value for money

With the advent of the internet, customers now have instant access to information about products and they are more discerning about their purchases. They want to know:

- The source of products – where they came from
- What they are made of
- How they are made
- Whether they are “green” or “ethically” produced
- How they compare with other products

Customers expect better service. “Every experience we have as a customer sets a benchmark against which the next experience is judged. This means that we expect better and better service ...” Each time you treat a customer better, they will come back to you. But that also suggests that we must get better and better each time.

Six inter-related elements make up the keys to customer service. They include:

1. **Research** to understand the wants, needs and satisfaction level of customers
2. **Strategies** the organization employs to provide quality customer service



3. **Processes** the organization has to provide quality customer service
4. **Measures** the organization uses to ensure accountability of service to the customer
5. People **skills** necessary to fully carry out the service
6. Awareness of what services **competitors** are providing their customers

Organizations often develop an overall *Charter for Customer Service* which include the:

- Organization’s purpose for customer service
- Principles or values within which service personnel are expected to operate
- Standards against which actual performance may be measured
- Measurements for success which give the basis for performance accountability

Do you know how many moments of truth occur in your place of business? Do your employees relate to internal and external customers with kindness and positive attitude? Do you have a customer service strategy and charter? Are you people skilled in providing quality customer service? Do you conduct research or customer focus groups to determine their needs or wants? Do you have ways to find out customer satisfaction? What are they? Do you know how your competitors relate to customers? Do you know their primary customer base? What measures do you have in place to ensure quality customer service? Are your people skilled in customer service? What metrics do you use to measure customer service and customer satisfaction?

What do you need to change to meet your Customer requirements?

Systems

Technology – Dashboards. A business dashboard is an information management tool that you use to track key performance indicators, metrics, and other key data points relative to your business, department, processes or team. The term comes from the car manufacturing world, where the dashboard gives indicators for how well your engine is running, how much fuel is in your tank, the air pressure in the tires, how many kilometers travelled and so on. The dashboard simplifies complex data allowing you to see at a glance how well your company is performing.

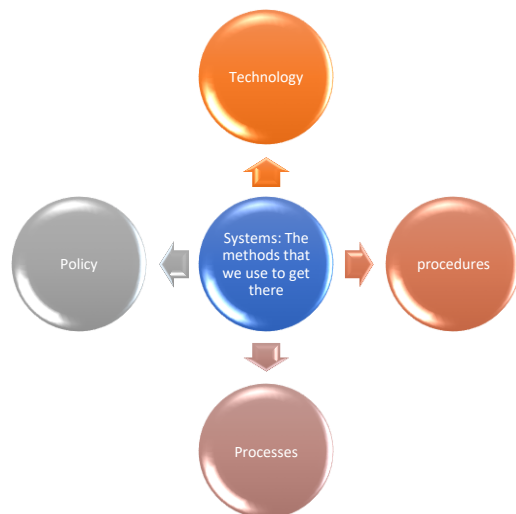
The dashboard usually has three types of indicators:

Strategic: These are the measurements we use to determine the success of our strategic direction

Business: These are the indicators we use to take the temperature of our business: They include indicators for: people, production, productivity, market standing and competitive position, sales generation and closure, customer satisfaction and profit margins and other financial indicators.

Systems: A system is a procedure or process used as a delivery mechanism for providing specific goods or services to customers. They show managers and employees what works and what doesn't; they are detailed, precise and usually built into the technology the business uses.

A well-designed dashboard informs all users across your organization of current business metrics on demand. They gather information from multiple points within your business and present it in understandable and reliable visuals. They usually show data, graphs, tables and gauges.



Business usually custom design their dashboard to their needs often using programs such as Excel, although there is generic dashboard software available.

Policy and Procedures. Policies are statements of intent relating to key functions within your business or organization; whereas procedures are the specific actions or steps to enact the policy. Policies and procedures are written in clear language, collated in manuals and available to all appropriate levels within an organization. Typical policy and procedures manuals are prepared for Human Resources, Marketing, Production/Manufacturing, Sales, and Finance. The purpose of policy and procedures to ensure people know what is expected of them and

what to do, when. They are the guideposts for positive action and deliverables.

Processes. Processes are the way people do things to achieve an outcome. They are akin to procedures or activities in carrying out policy or tasks. Processes indicate “how” people go about doing their work. Processes can get gummed up resulting in delayed outcomes. Many businesses review processes on a regular basis to ensure they are operating at peak proficiency. Normally those who are charged with carrying out a process are involved in their review. They track how they carry out tasks and make recommendations for improvement or elimination.

Do you have a dashboard that provides you with key metrics? Does it have weaknesses? Does it need to be tweaked? Is it giving you the information you need to lead and manage your business/organization? Are your technological devices (computers, cell phones, tablets) current? Have you developed policy and procedure manuals for key functions? Are the manuals current, readable, and clear? Do you date stamp when the policy was developed? Do you date the policy when you change or up-date it? Are your processes proficient. Are their areas where you can be more productive? Are your people involved in improving processes?

What do you need to change to meet your Systems requirements?

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Finances

Operational plans have financial requirements as do any goal, initiative or objective. When you determine your action plan you need to isolate the financial implications for each objective and measure your actions to your overall financial target. There are times when you may not be sure what your financial requirements are until you have completed an action plan, and even then, you probably can only achieve an approximation or estimate. Therefore, when sorting out your financial requirements you need to consider realistic contingency costs. When you have completed your plan develop a process whereby you not only track your objective’s progress but also the year-to-month, or year-to-quarter costs in relation to your projected financial budget. Most financial software companies have these metrics built into their programs.

NEXT STEPS

In the *Nuts and Bolts of Mapping A Strategic Plan*, you outlined your strategic intent. Now you have reviewed your operational considerations. It's time to take the next steps.

1) Set SMART Operational objectives related to your Goals or Strategic Initiatives

2) Map out Project Plans to achieve your objectives.

1) SMART Operational Objectives are Specific, Measurable, Attainable, Relevant and Trackable.

They usually include two of three elements: time, quality and/or quantity. For example, let's take a Goal that was written in the *Nuts and Bolts of Strategic Mapping*:

<p><i>Work Culture</i></p>	<p><i>To have a work environment where people are happy, healthy and inspired to be the best they can be.</i></p>	<ul style="list-style-type: none"> • <i>Strong motivational leadership</i> • <i>Trained and skilled employees</i> • <i>A well-balanced workplace</i> • <i>Fair performance management processes</i> • <i>A learning organization</i>
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Your analysis pointed out that your Performance Management Process was weak, and you set it as a priority for improvement. A SMART objective could look like this:

By (Date) we will have a revised Performance Management System in place that is fair, equitable and manageable at an investment of no more than xxx dollars

- ***Fair meaning: reasonable and acceptable***
- ***Equitable meaning: impartial and unbiased***
- ***Manageable meaning: timely and doable***

This objective is SMART. It is **Specific** in that it relates to one system. It can be **Measured** in two ways, the deadline set and by the quality elements relating to fairness, equity and manageable. It is **Attainable** given the time line and budget implications. It is **Relevant** to the needs of the organization; and it is **Trackable** once the milestones are set.

Under the Goal of Sales, a SMART objective using **quantity, date, and investment** could look like this:

We will have increased our customer base by xxxx (Number) by (Date) at an investment of xxxxx.

Now for each of your Goals complete objectives. The objectives may extend over a one to three-year period or longer, depending on human, financial and/or technical resources. Your map now begins to look like the one on the following page.

STRATEGIC PLAN					DATE:	OPERATIONAL PLAN		
Vision	Mission	Values	Goal Areas and Goals	Key Results	Strategic Initiatives	20--- Objectives	20--- Objectives	20--- Objectives
			Goal Area: Goal:					
			Goal Area: Goal:					
			Goal Area: Goal:					
			Goal Area: Goal					
Over Arching Goal:								
Far Reaching Goals:								

2) Final Steps: Map out Action Plans to achieve your objectives

ACTION PLANS: Action Plans give us the road map to achieving our objectives. Just as we use a city map or GPS to guides us to our destination, action plans guide us towards achieving our purpose and objectives. Action plans set out strategies (tasks), resources and time lines.

ACTION PLANNING TOOL

The Following Planning Tool outlines the map for turning your SMART objectives into actions. Number's 1 to three should already be established; if not then make sure that portion is completed. Often, when you work through the mapping process you may find your original date is unrealistic, if that is the case then adjust where necessary.

1. Turn SMART objectives into an Action Plan
2. Identify target date for completion.
3. Clarify Objective, Expected Results, and Person Responsible for the project.
4. Brainstorm and breakdown the Action Plan into manageable portions by identifying the primary words or key phrases that describe the specific actions that you need to complete. An excellent method for brainstorming is the use of [a Mind Map](#).
5. Review your brainstorm results and identify primary Actions (tasks), and resources needed to complete the tasks.
6. Sequence the Actions (tasks).
7. Review with your team (or include your team right at the beginning), sort out each team member responsibilities and note if others need to be involved.
8. Estimate length of time required for each task.
9. Set dates to begin and complete each task.
10. Prepare contingency plans to accommodate potential problems, such as budget short falls, people issues and time requirements. Be prepared to adjust your plans due to significant changes in your environment.
11. Keep track of progress and adjust as required.
12. Evaluate at the end of the project for lessons learned.

Note: This is a simple Action Planner. Complicated projects may require more detailed project planning. An excellent project planning program is found [here](#).

This Action Planner is a useful tool to plan any small personal or business project.

If you would want a copy of a digital Action Planner click here to download.

ACTION PLANNER 2018-2019

PURPOSE/PROJECT	IMPLEMENT PERFORMANCE MANAGEMENT SYSTEM	GOALS: Complete Performance System by (Date)
LEADER/MANAGER NAME	RICHARD	OUTCOMES: Accepted by employees Unbiased system Applicable and timely

PRIMARY ACTIONS/TASKS	SEQ.	START DATE	END DATE	PRIMARY ACTIONS/TASKS	SEQ.	START DATE	END DATE
RESEARCH PERFORMANCE SYSTEMS	1	01.15.18	02.08.18	REVIEW EXISTING SYSTEM	3	02.18.18	02.28.18
DETERMINE BUDGET	2	02.15.18.	02.15.18	DETERMINE IF DEVELOP INTERNAL OR EXTERNAL	4	03.05.18	03.05.18
IF EXTERNAL PREPARE RFP AND SEARCH CRITERIA	5	03.10.18	03.15.18	DESIGN TO MEET COMPANY NEEDS	8	04.25.18	05.15.18
SELECT CONTRACTOR AND SET OUT TERMS	6	03.30.18	04.15.18	ENGAGE EMPLOYEES FOR INPUT	9	05.20.18	05.30.18
SIGN CONTRACT	7	04.20.18	04.20.18	RE-DESIGN AND TEST WITH EMPLOYEES	11	06.20.18	08.15.18
MAKE ADJUSTMENTS TO DESIGN	10	06.05.18	06.15.18	ROLL OUT FOR IMPLEMENTATION	12	10.01.18	10.30.18

MARCH							APRIL							MAY							JUNE							JULY							AUGUST						
M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
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KEY PEOPLE INVOLVED:	RESPONSIBILITIES
Carolyn	Review and Research design
George	Finance Department
Betty and Bill	Organize employee input
Richard	Contracting – if required

INFORMATION REQUIREMENTS	WHERE TO FIND IT
Research	Internet; Discussions with non-compete companies
Computer and technology requirements	Software packages if required
Intranet and Website additions	Melcher Media and Design
Contractors	RFP search

CONTINGENCY PLANS

POTENTIAL PROBLEM	HOW TO FIX IT	IMPACT ON TIME LINE/ BUDGETS
Budget requirements to great	Lengthen time line; Reduce design requirements	Extend time line
Unable to attract contractors	Re-advertise; Do in house	May need to extend time line/ may reduce budget
Unexpected HR issues	Farm out/Extend time line	Extended time line/ impact on budget

EVALUATION

WHAT WENT RIGHT	WHAT WENT WRONG	HOW WE CAN IMPROVE

