ScalabilityPro

Welcome to ScalabilityPro

Presented by

Optimize

Strategy • Alignment • Scalability

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Introduction

ScalabilityPro is a comprehensive strategy and scalability system built for growing, thriving, mid-market companies. It's rooted in best practices learned from conducting over 400 strategy projects.

Mid-market companies who aspire to build professional management teams face a common set of problems. They are focused on building a mid-management layer, integrating systems, leveraging KPIs, and ensuring their growth plans are evolving with their environment. For such companies, canned, templated systems are no longer adequate.

Strategy as a cycle and not an event

Strategic planning is a set of inputs and outputs.

Professional managers have an appetite for gathering data necessary to make fact-based decisions. This includes market analysis, competitor analysis, employee engagement findings, financial projections, and internal reporting. By spending the time to develop the inputs, a management team can improve the quality of their outputs—the result of strategic planning.

Such teams also recognize the importance of creating space for the activities that happen after strategic planning. When thought of as a cycle, mid-market companies publish a corporate calendar and plot their work in a methodical fashion. Activities are often reserved for the latter part of the year and include cascading goals (we use the OKR methodology), performance management, incentive plans and budgeting.

3-Step Process for Strategic Planning

1 Prework and Assessment

- Strategic Assessments
- Executive Interviews
- Employee Engagement
- Market Analysis
- Working Group Meetings

6 - 9 Weeks

2 Strategy Planning Meeting

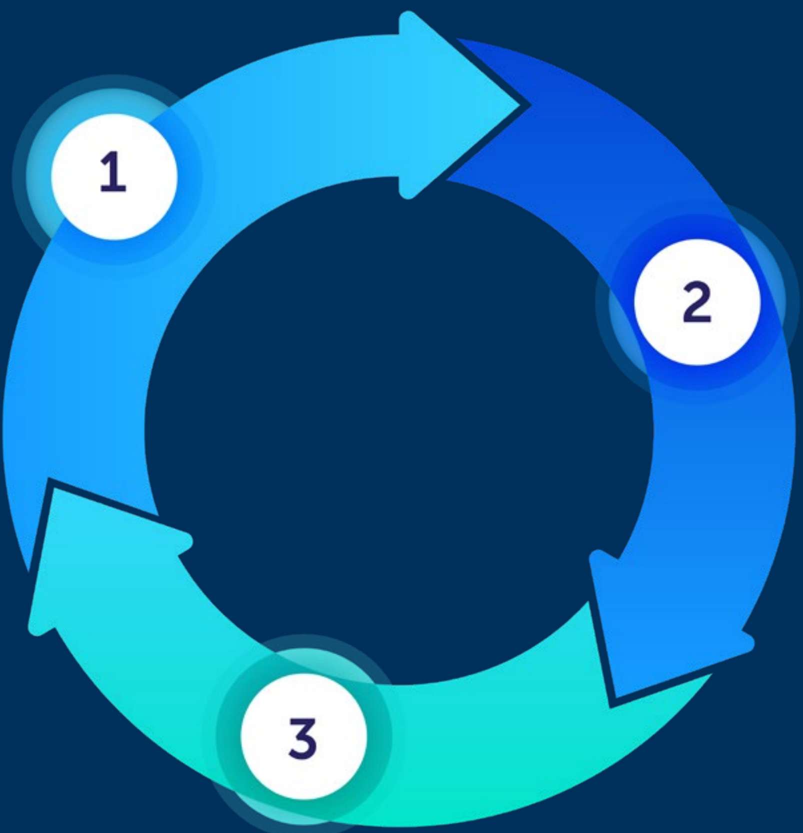
- Strategy session with leadership team
- Documentation

1.5 - 2 Days

3 Execution

- Quarterly Follow-Up Meetings
- Departmental Goal Setting
- OKRs

9 Months



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Using working groups for collaboration

The ScalabilityPro Framework also recognizes that there may be contributors who take part in strategy that are not members of a senior leadership team. We commonly organize into three working groups that are not restricted to the strategy team:

SWOT & Market Analysis:

This group analyzes the company's market, addressable market and growth strategies, and helps develop sales and marketing plans.

Capabilities & Capacity:

This group evaluates the company's internal capabilities and internal strengths and weaknesses.

Culture & HR:

This group executes an employee engagement study (if applicable) and ensures the company protects and builds a best-in-class workplace culture.

Assessment Tools

Optimize has developed a set of proprietary tools and technologies that mid-market companies can use to gather data that drives informed decisions:

Market Analysis:

Optimize utilizes industry report databases and other research tools that help us evaluate markets. We collaborate with clients to conduct studies of the addressable market.

Functional Assessments:

We ask the department heads of our client companies (Accounting, HR, Marketing, Operations, and Sales) to complete self-assessments of their departments.

Partial Example-Functional Assessment

Human Resources: Culture, Engagement & Retention

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Strategy Meetings

As expert strategy consultants, Optimize facilitates strategy meetings in a proven format. Most clients go offsite. Participants in a strategy meeting are typically restricted to the senior management team, key contributors, and department heads.

2 Days

Most of these meetings are roughly two days. Typically, a strategy agenda begins high-level with a clear corporate vision from ownership, and a rearticulation of mission and values.

The meat of a strategy meeting is an evaluation of the company's market and competitive positioning. At the root of strategy is the ability to answer the question, how will we maintain a sustainable competitive advantage? Where and how will the company win?

Once there is agreement on the company's target markets and sales and marketing approach, we turn our attention to internal capabilities and capacity, and an understanding of what people, processes and technology a company will need to promote scale.

A critical element of the ScalabilityPro Framework is creating a set of goals, objectives, project plans, and KPIs.

Documentation

During and after a strategy meeting, Optimize produces the following documentation:

Vision Map

Action Plan

Action	2022	2023				Work Group	Assist
	Q4	Q1	Q2	Q3	Q4	Champion	
Be an employer of choice							
Action items							
Make decision regarding dedicated talent acquisition	x					Phil	IT Team
Create a corporate communication function			x			Jordan	Marketing
Develop onboarding checklist		x				Jordan	Phil

PowerPoint Summary

Be an employer of choice

HR priorities:

- Develop employer branding content and webpage
- **2023 / 2024 hires:**
  - VP of Client Success
  - Quality Manager
- Execute employee retention plan
- Employee self-guided learning plans
- Re-establish Townhalls / communication plan
- Stay interviews
- Mentoring program
- Expand DEI to include PH & Raso
- Social events
- Corporate communication plan: over-communicate about goals, policies, etc.

S.M.A.R.T. Goal: Maintain internal attrition at or below 28%

Tools for Accountability and Execution

Depending on the options chosen, Optimize typically conducts 3-6 follow-up meetings over the course of the year. The purpose of follow-up meetings is to:

- Determine whether mid-course corrections are required
- Review the Vision Map and high-level objectives
- Update the Project Plan based on changing priorities
- Complete Scalability Workshops

People

- Succession planning
- Workforce planning
- Roles and responsibilities
- Performance management
- OKRs

Process

- SOPs
- KPIs
- Budgeting
- Cost controls

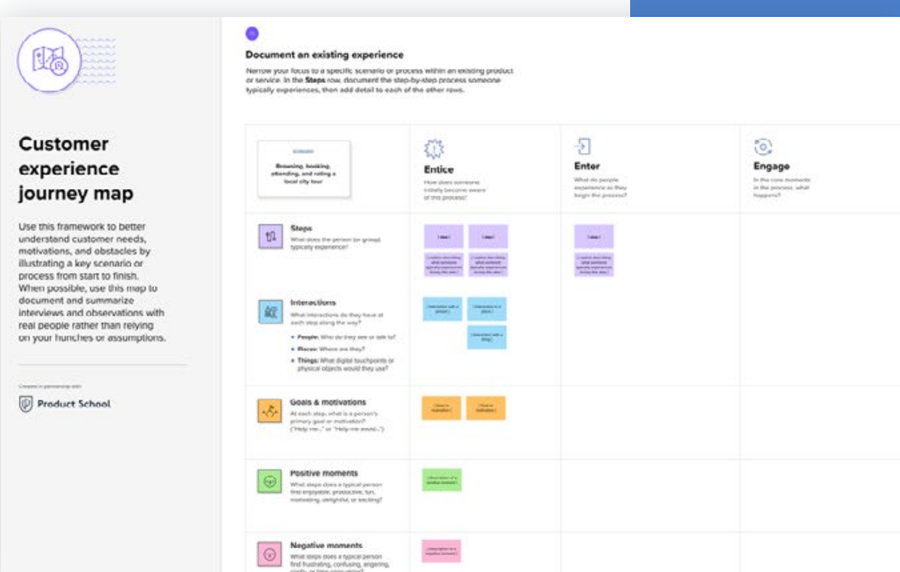
Technology

- SOPs
- Digital transformation
- Workflow automation
- Innovation

Growth

- Customer journey
- Value proposition
- Value chain
- Revenue segmentation
- Marketing personas

Scalability Workshop Exercise (example)



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Thank You

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