



Business901

Building Funnels of Opportunity

OPPORTUNITY



SALES PDCA A3

<p>Team Name:</p>	<p>Sales Cycle ID:</p>	<p>P: Plan What are the detailed steps you will take to make an improvement? Clarify the problem, breaking down customer decision process and people involve. Locate the point of concern or cause through Who, What, Where, When Identify root cause and verify with data. Develop countermeasures utilizing user stories and place on Kanban board, prioritize.</p>												
<p>S: Select the initial Problem Perception <i>What is the problem to be solved? Describe the problem, issue or need that your project is intended to address.</i></p>														
<p>A: Analyze the current process Review the Critical to Quality (CTQ) issues facing this value stream and how they apply to this cycle. What should be involved in this step? Have customers' expectations and specifications been examined and documented? What are the points of concern?</p>		<p>D: Do the plan Build Project Plan or iteration through user stories. Use a Kanban board to visualize work flow and who is doing what. Pull tasks into doing as needed. Use daily stand-ups or Andon to signify problems or hang-ups.</p>												
<p>L: Locate the people who understand the process List the members of your team, including position and role they will play.</p> <table border="1" data-bbox="102 967 1547 1272"> <thead> <tr> <th data-bbox="102 967 621 1018"><u>Name</u></th> <th data-bbox="621 967 1149 1018"><u>Position</u></th> <th data-bbox="1149 967 1547 1018"><u>Role</u></th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		<u>Name</u>	<u>Position</u>	<u>Role</u>										<p>C: Check (Study) to see if an improvement was made Did the plan work? Collect and analyze data to demonstrate if gap was closed or not. Determine which changes worked and which did not.</p>
<u>Name</u>	<u>Position</u>	<u>Role</u>												
<p>E: Empower the Team The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team (Team Charter) to accomplish process.</p>		<p>A: Act (Adjust) Has Gap been closed? Have Customers' needs been completed? If not, reconsider and continue improvement with PDCA. If it has can customer be handed off to next stage? Document the steps that will need to be taken for this and complete hand off.</p>												
<p>S: Select the Improvement The team must fully understand not only the CTQ's of the overall Value Stream but the CTQ's of this particular cycle. Define the Gap that is to be completed in this cycle.</p>														

Continuous Improvement: PDCA A3

Team Name:

Sales Cycle ID:

D: Do the plan

Build Project Plan or iteration through user stories. Use a Kanban board to visualize work flow and who is doing what. Pull tasks into doing as needed. Use daily stand-ups or Andon to signify problems or hang-ups.

P: Plan

What are the detailed steps you will take to make an improvement?

Clarify the problem, breaking down customer decision process and **people involve**.

Locate the point of concern or cause through Who, What, Where, When

Identify root cause and verify with data.

Develop countermeasures utilizing user stories and place on Kanban board, prioritize.

C: Check (Study) to see if an improvement was made

Did the plan work? Collect and analyze data to demonstrate if gap was closed or not. Determine which changes worked and which did not.

A: Act (Adjust)

Has Gap been closed? Have Customers' needs been completed? If not, reconsider and continue improvement with PDCA. If it has can customer be handed off to next stage? Document the steps that will need to be taken for this and complete hand off.

SALES SDCA A3

Team Name:	Sales Cycle ID:	S: Standard Review the method. Document the actions needed and who will complete each action step. Clarify the resources needed for each action step. Decide on what constitutes variation and required action.												
S: State the standard <i>Standard work is the best practice for a given process. It should provide a routine for consistent delivery of work and to do this it must be stated clearly and provide a clear line of sight to the Value Stream Manager, Team Coordinator and Team Members.</i>														
A: Agree on the method. What is the method you are going to use for the documentation of standard work. It will provide the necessary components of a reporting system that ensures the work is being done as expected. What are you currently doing?														
L: Locate the people who will be on the team. List the members of your team, including position and role they will play. <table border="1" data-bbox="96 967 1547 1272"><thead><tr><th data-bbox="96 967 621 1018"><u>Name</u></th><th data-bbox="621 967 1149 1018"><u>Position</u></th><th data-bbox="1149 967 1547 1018"><u>Role</u></th></tr></thead><tbody><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr><tr><td> </td><td> </td><td> </td></tr></tbody></table>		<u>Name</u>	<u>Position</u>	<u>Role</u>										D: Do the plan Perform to the standard. Use a Kanban board or other means of visualization to demonstrate work flow and problems encountered.
<u>Name</u>	<u>Position</u>	<u>Role</u>												
E: Empower the Team The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team to accomplish process.		C: Check (Study) to see if an improvement was made Did the plan work? Collect and analyze data to demonstrate if standard was done. Determine what changes are needed for improvement.												
S: Select the Team Goals of the Project The team must fully understand the exact goals and outcomes that are expected for this particular cycle.		A: Act (Adjust) Is the standard being completed. Has Customers' needs been completed? If not, reconsider and continue improvement with PDCA. If it has can customer be handed off to next stage/cycle? Document the steps that will need to be taken for this and complete hand off.												

Standard Work: SDCA A3

Team Name:

Sales Cycle ID:

S: Standard

Review the method.
Document the actions needed and who will complete each action step.
Clarify the resources needed for each action step.
Decide on what constitutes variation and required action.

D: Do the plan

Perform to the standard. Use a Kanban board or other means of visualization to demonstrate work flow and problems encountered.

C: Check (Study) to see if an improvement was made

Did the plan work? Collect and analyze data to demonstrate if standard was done. Determine what changes are needed for improvement.

A: Act (Adjust)

Is the standard being completed. Has Customers' needs been completed? If not, reconsider and continue improvement with PDCA. If it has can customer be handed off to next stage/cycle? Document the steps that will need to be taken for this and complete hand off.

SALES EDCA A3

<p>Team Name:</p>	<p>Sales Cycle ID:</p>	<p>E: Explore Visualization: using imagery to envision possible future conditions Journey Mapping: assessing the existing experience through the customer’s eyes Value Chain Analysis: assessing the current value chain that supports the customer’s journey</p>					
<p>Sense-making: Give meaning to experience. Create a point of view statement that defines the efforts to understand connections which can be among people, places, and events. Understanding the problem space is many times as important as understanding the user.</p>							
<p>A: Analyze the user Define and study the user to develop insights as a starting point for defining value. Review and focus on the service period to determine the pre-service, service and post service durations.</p>		<p>D: Do the plan Concept Development: assembling innovative elements into a coherent alternative solution that can be explored and evaluated Mind Mapping: generating insights from exploration activities and using those to create design criteria Brainstorming: generating new alternatives to the existing business model Concept Development: assembling innovative elements into a coherent alternative solution that can be explored and evaluated</p>					
<p>L: Locate the people who understand the user and the needs List the members of your team, including position and role they will play.</p> <table border="1" data-bbox="102 967 1547 1272"> <thead> <tr> <th data-bbox="102 967 621 1018"><u>Name</u></th> <th data-bbox="621 967 1149 1018"><u>Position</u></th> <th data-bbox="1149 967 1547 1018"><u>Role</u></th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>			<u>Name</u>	<u>Position</u>	<u>Role</u>		
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<p>S: Select a limited set of needs you are designing for—your user. Create user stories based on this set of needs.</p>		<p>A: Act (Adjust) Have exploratory needs been completed? If not, reconsider. If it has continue improvement with a Learning Launch (PDCA) creating an affordable experiment that lets customers experience the new solution over an extended period of time, so you can test key assumptions with market data. Document the steps that will need to be taken for this and complete hand off.</p>					

Innovation A3: EDCA

Team Name:	Situation:	D: Do the plan (What wows?): Assumption Testing: isolating and testing the key assumptions that will drive success or failure of a concept Rapid Prototyping: expressing a new concept in a tangible form for exploration, testing, and refinement
E: Explore Create Current State (What is?): Visualization: using imagery to envision possible future conditions Scenario Mapping: Map steps a user takes to complete a task in context of multiple scenarios. Value Chain Analysis: assessing the current value chain that supports the customer's JTBD		
Create Future State (What if?): Mind Mapping: generating insights from exploration activities & using it to create design criteria Brainstorming: generating new alternatives to the existing business model Concept Development: assembling innovative elements into a coherent alternative solution that can be explored and evaluated		C: Check (What works?): Incorporating customer feedback Customer Co-Creation: Enroll customers to participate in creating the solution that best meets their needs Learning Launch: Creating an affordable experiment that lets customers experience the new solution over an extended period of time, so you can test key assumptions with market data.
		A: Act (What now?): Have exploratory needs been completed? If so, document the steps that will need to be taken to complete hand off into a PDCA cycle. If not, reconsider and retrace steps. <p style="text-align: right;"><i>Start a EDCA/PDCA cycle for the next phase of the project -</i></p>

SALES CAP-Do A3

<p>Team Name:</p>	<p>Sales Cycle ID:</p>	<p>C: Check List what we are presently doing – Why, What, How Share and document experiences in the SALES Team Review organizational structural forces List what we are certain and uncertain about Value Chain Analysis: assess the current value chain that supports the customer’s journey</p>						
<p>Sense-making: Give meaning to experience. Create a point of view statement that defines the efforts to understand connections which can be among people, places, and events. Understanding the problem space is many times as important as understanding the user.</p>		<p>A: Act (Adjust) Confirm with Customers/Markets key certainties and uncertainties Observe, Think and Feel: Planning is not done in isolation. Visit customers, go to Gemba for planning. Write stories with customers of existing events Write stories of customers of future events/scenarios</p>						
<p>A: Analyze the user Define and study the user to develop insights as a starting point for defining value. Review and focus on the service period to determine the pre-service, service and post service durations.</p>		<p>P: Pause (Presencing) Are the stories clear, concise and relevant? Reflection – The stories that you created in Check match with stories in Act (Divergent views are important) Isolate and group key assumptions Seek to understand</p>						
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<u>Name</u>	<u>Position</u>	<u>Role</u>						
<p>E: Empower the Team The team is autonomous and completely responsible for the tasks within this stage. Clarity is the most critical factor for empowering a team. Outline Meetings, Daily Stand-ups, Weekly Tactical and others as needed. Define Standard Work of Team (Team Charter) to accomplish process.</p>		<p>D: Do Enact our Decisions</p> <p style="text-align: center;">=> Create Standard Work for what not to change => Create Plan to do different (SOAR/SWOT) => Create Plan to Start Something New => Stop what we don't want to do</p>						
<p>S: Select a limited set of needs you are designing for—your user. Create user stories based on this set of needs.</p>		<p>Customer Co-Creation: enroll customers to participate in creating a solution that best meets their needs Analyze and optimize: isolating and testing the key assumptions that will drive success or failure of a concept Rapid Prototyping: express new concepts in a tangible form for exploration, testing, and refinement Relate and Influence: No matter how good of an idea you have, the key is still in gaining acceptance of others, build constituency.</p>						

Agile Project Management: The Highsmith A3

Team Name:	Situation:	E: Explore (Run small iterations constantly seeking to reduce risk and uncertainty) Iteration Planning: Decide story release, workload management (WIP) and how it will be monitored. Team Assistance: Establish rhythm by providing resources, removing roadblocks and aligning capabilities with iteration. Decision Making: Frame decision model guided by project principles developing team cohesion and clarity along the way.														
E: Envision (Determine Vision, Objectives, Constraints and Community)																
Project Vision: What is the Project vision? - Elevator Test	Business Objectives: What are the project's business objectives?															
Project Scope: What is the total project scope? Define Project Guidelines Objectives and Constraints	Project Architecture: Describe how the project will be carried out; the internal plumbing.	A: Adapt (Review Results, Current Situation, Team Performance) Value: Are we progressing toward our target? Constraints: Are we staying within our original budget, scope? Team: Is our performance acceptable? Can we make the necessary decisions? Do we need help? Parking Lot: What obstacles are present?														
	<table border="1"> <thead> <tr> <th>Trade-off Matrix</th> <th>Fixed</th> <th>Flexible</th> <th>Accept</th> </tr> </thead> <tbody> <tr> <td>Scope</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Schedule</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Cost</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Trade-off Matrix	Fixed	Flexible	Accept	Scope				Schedule				Cost	
Trade-off Matrix	Fixed	Flexible	Accept													
Scope																
Schedule																
Cost																
Project Community: List participants & expected impact on project Critical Essential Non-Direct:	Project Team: List team members & roles Team Lead: Team Members:	C: Close (Conclude the project, pass along key learnings and celebrate) Open Items: Do we have anything open? Close and note Document: Project outcomes and project learnings. Deliverable: If this project is to be standardized for others use. pass on and insure continuation.														
S: Speculate (Develop a Capability and Iteration Plan to deliver on Vision) Focus on Stories: Create small experiments in story form and develop a backlog Release Planning: Plan customer experience stories over an extended period of time and determine risk Prepare for Deployment: Plan iterations grouping stories if needed prioritizing learning and reducing risk.		Determine to iterate (Explore) more, move to Close, or Loop to Speculate														

Market Segment A3

Customers or Industries	Job Needed to Be Done:		
	Gains:	Pains	
	Value Proposition:		
	Functional Value Statement	Emotional Value Statement	Social Value Statement
Explore: What does the Customer Know, Feel, Do? What do we want them to Know, Feel, Do?	Engage What does the Customer Know, Feel, Do? What do we want them to Know, Feel, Do?	Empower What does the Customer Know, Feel, Do? What do we want them to Know, Feel, Do?	
Customer Roles: (RAPID):	Customer Roles: (RAPID):	Customer Roles: (RAPID):	

Marketing Plan A3

Strategic Context

Team Name:	Team Leader:
Mission Statement:	
Financial Summary:	

Objectives:
From what to what by when

Situation Review

Company

Product/Market Segments

Key Accounts

Marketing Audit:			
Strength (What is our core?)		Opportunities (What might be?)	
Aspirations (What Should be?)		Results (What will be?)	
Strength	Weakness	Strength	Weakness
Opportunities	Threats	Opportunities	Threats
Strength	Weakness	Strength	Weakness
Opportunities	Threats	Opportunities	Threats

Strategies
How will you do this, What will you use

Budget and Implement
Identify tactics that will be explored with budgeted costs

	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Tactics(\$)				
Tactics(\$)				
Tactics(\$)				
Tactics(\$)				

Company

P/M Segments

Key

Company

P/M Segments

Key

Company

P/M Segments

Key Accts

Strategy Formulation

Resource Allocation & Monitoring

Startup Marketing Plan A3

Strategic Context

Team Name:	Team Leader:
Mission Statement:	
Financial Summary:	

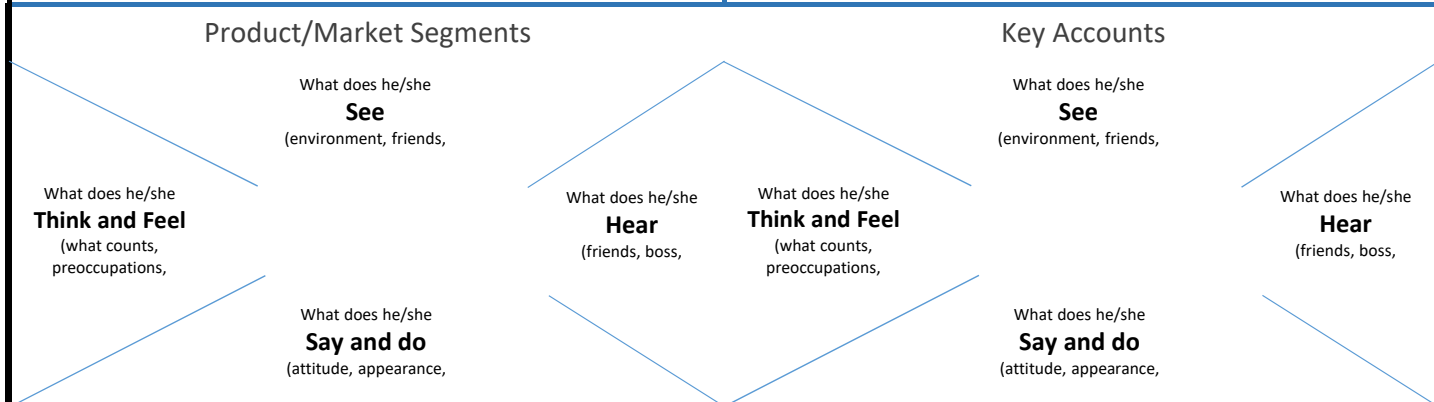
Objectives:
From what to what by when

Situation Review

Marketing Audit:

Strategies
How will you do this, What will you use

Strength (What is our core?)	Opportunities (What might be?)
Aspirations (What Should be?)	Results (What will be?)



Pain (fears, frustrations, obstacles)	Gain (wants, needs, measures of success)	Pain (fears, frustrations, obstacles)	Gain (wants, needs, measures of success)
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Key Assumptions:

Company

P/M Segments

Key

Company

P/M Segments

Key

Company

P/M Segments

Key Accts

Strategy Formulation

Resource Allocation & Monitoring

Budget and Implement
Identify tactics that will be explored with budgeted costs

	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Tactics(\$)				
Tactics(\$)				
Tactics(\$)				

	Product (Service)/Market Description:	<h1>SWOT Analysis</h1>										
		Strength/Weakness Analysis (1 to 10)										
		Weighting	Us		Comp #1		Comp #2		Competitor #3		Competitor #4	
ID #	Critical Success Factors	(Total 100)	Score	x Weight	Score	x Weight	Score	x Weight	Score	x Weight	Score	x Weight
1		5	1	5	2	10	3	15	4	20	5	25
2		10	6	60	7	70	8	80	9	90	10	100
3		15	5	75	4	60	3	45	2	30	1	15
4		30	10	300	9	270	8	240	7	210	6	180
5		40	5	200	4	160	3	120	2	80	1	40
	Totals	100	27	640	26	570	25	500	24	430	23	360
	Opportunities	Threats					Key Issues needed addressed					
1												
2												
2												
3												
4												
5												
	Key Assumptions	Key Objectives				Key Strategies				Financial		
1												
2												
2												
3												
4												
5												

Product (Service)/Market Description:		SOAR Analysis										
		Strength/Opportunites Analysis (1 to 10)										
ID #	Critical Success Factors	Weighting	Us		Comp #1		Comp #2		Competitor #3		Competitor #4	
		(Total 100)	Score	x Weight	Score	x Weight	Score	x Weight	Score	x Weight	Score	x Weight
1		5	1	5	2	10	3	15	4	20	5	25
2		10	6	60	7	70	8	80	9	90	10	100
3		15	5	75	4	60	3	45	2	30	1	15
4		30	10	300	9	270	8	240	7	210	6	180
5		40	5	200	4	160	3	120	2	80	1	40
Totals		100	27	640	26	570	25	500	24	430	23	360
Aspirations		Results				Key Issues needed addressed						
1												
2												
2												
3												
4												
5												
Key Assumptions		Key Objectives				Key Strategies				Financial		
1												
2												
2												
3												
4												
5												

Dealstorming

Adapted from the book DEALSTORMING: The Secret Weapon That Can Solve Your Toughest Sales Challenges by Tim Sanders

Team Name:	Situation (Title)	Execute: The account executive is responsible for managing execution of ideas from the meeting, with the help of team members.
Qualify: Sales managers assess the need for collaboration and then calculate the resources required for a Dealstorm based on the significance of the challenge as well as its level of difficulty or the inability of the current sales process to solve it.		
Organize: Account executives organize the Dealstorming team based on who knows something about the problem space or will be affected by the outcome.		
Prepare: Account executives prepare their teams by writing a comprehensive but compact deal brief that frames the challenge and gives everyone involved key information related to the sales challenge.		Analyze: Dealstorm progress should be reported to each team member, along with notifications about future meetings (if required). If the Dealstorm was successful, any innovations should be shared with sales leadership to improve the system going forward.
Convene: The team convenes for a Dealstorming meeting that is tightly facilitated and utilizes templates and exercises for problem and solution finding.		Report: Dealstorm progress should be reported to each team member, along with notifications about future meetings (if required). If the Dealstorm was successful, any innovations should be shared with sales leadership to improve the system going forward.

The Disney Way

Adapted from the book *The Disney Way: Harnessing the Management Secrets of Disney in Your Company* by Bill Capodagli & Lynn Jackson

Team Name:	Situation (Title)	Do: Create the Plan to become the "Best Show" & Monitor		
Dream: Identify Guest Problems and Dreams - Visualize the rewards and Outcomes		Financial Results		
		Cost Per Output	Profitability	Cash Flow
Believe: Create a Quality "Cast Experience" - Establish Strategic Partnerships		Cast Experience		Guest Experience
		Surveys		Surveys
		Storyboards		Storyboards
		Focus Groups		Focus Groups
Dare: Take the Risk to Develop the "Best Show" Experience for Your Guest		Benchmarking		Benchmarking
		Improvement Efforts		
		Process Evaluations	Cycle Time Readiness	New Strategic Alliances

Team Name:		Situation:			
Step Back		Step Forward			
In the Gallery Standing back,taking an overview of what's happening	In the Kitchen In a more private space and intimate space, preparing and reflecting	With the Guest Still in view, one of the group, not the center of attention		In the Spotlight Being the focus of attention, out front, making things happen	
		Initiator			
		Listen for what is called for Avoid Ant Country Keep awareness of what is happening	Form a hope, intention Get things moving Respond w dynamic steering		
		Inviter			
		Think about whom to invite What do you do next? Offer choice and space	Start with asking Make it personal Extend yourself		
		Space Creator			
		What would be a great space? What message are you conveying? Hold space while people use it	Create space to support what is happening focus on details Keep the space fresh		
		Gatekeeper			
		Take note of thresholds Observe container size Step back and welcome	Welcome, establish ritual Change container size as needed Be prepared to exclude - a + NO		
		Connector			
		Look for non-connected Build between others Be aware of all connections	Connect w New Connect others Respond to new openness		
		Co-Participant			
		Serve others first Take a turn w mudane Alert to pinch points	Step forward to provide Join & eat same food Intervene if necessary		
In the Gallery	In the Kitchen			With the Guest	In the Spotlight
Step Back		Step Forward			