Curriculum Outline

GETTING STARTED

**Personal Development**

Understanding Yourself and Your Plan

Using Goals and Metrics to Drive Personal Success

**Business Opportunity Analysis**

How to Quickly Evalaute Opportunities/Startups

Enviromental Scanning techniques (SWOT)

Customer Knowledge (Custoemr Personas, First-person research/validation)

**Creating Your Business Model**

Game Design: How to define Goals, values, and guiding principles for business

How to Use the Business Model Canvas (for communication and simplification)

Defining and Measuring Metrics/KPIs

**Creating a Culture and Developing People**

Creating a Lean Pitch

Outlining Key Processes

Governance Methods

Defining Key Roles and Accountability

Building your “tribe”

Personal Work Prioritization methods

The Methods and Power of Positive Behaviorla Change

**Industry Specific Tools**

HIPPA Compliance

Technology Planning

Needs Assessments

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Reviewing the Plan 6

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Create Assets 6

Distribute 6

Participate in Communal Activities 6

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Capture Metrics 6

Monitor Sources for Lead Generation 6

Set up and Monitor Google Alerts 6

Touch base regularly with RFP contacts 6

Manage Relationship with Referral Partners 6

Monitor Inbound Lead Sources 7

Leverage Your Existing Contacts 7

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Evaluate Activity 7

Conduct at Activities 7

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2nd follow up, then flag contact for follow up 10 days from contact 8

3rdfollow up, notify that follow up will happen within 6 months and will be available if they call us 8

Continue to reach out every 3 weeks 8

If Contact Yes: set meeting and offer free 1 hour consultation 8

If Contact No, flag to follow up 6 months later and remove from hunt list 8

If Contact No, upon 6 month follow up research business and re-identify target 8

Get the first meeting (in person or remote) 8

First Discovery Meeting or Call 8

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Share values and discuss NEWCO 8

Share previous projects 8

Discover possible opportunities 8

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Submit the Proposal 9

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(WON) Mark opportunity as Won and onboard the client 9

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Monthly 14

Quarterly 14

Yearly 14

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Changing Our Processes 14

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# Marketing

## Generating the Marketing Plan

### Identify Targeted Sales Goals

#### Metrics for Measurement

### Determine Our Buyer Profiles

#### Determine Demographics

* + Age
  + Gender
  + Likes
  + Dislikes
  + Location

#### Determine Psychographic

* + Hopes
  + Fears
  + Goals
  + Desires

### **Determine Market Capacity**

* + By size
    - 1-5
    - 6-20
    - 21-50
    - 51-150
    - 150+
  + By industry
    - Education
    - Professional Service (B2B)
    - Social Service

### Research Market Trends and Channel Opportunities

#### Referral Partners

### Validate Our Value and Service Model

#### Conduct short validation survey with 5-10 clients (new or previous) that can inform

### Draft the Plan

#### Hone the Language We Communicate With

#### Response Plan

### Reviewing the Plan

## Execute the Content Strategy

### Create Assets

#### Printed Materials

#### Digital Materials

### Distribute

#### Web Site

#### Social Media

### Participate in Communal Activities

#### Evaluate Activity

#### Conduct at Activities

### Monitor Interactions and Alert the Team

### Capture Metrics

## Monitor Sources for Lead Generation

### Set up and Monitor Google Alerts

### Touch base regularly with RFP contacts

## Manage Relationship with Referral Partners

Follow up with Referral Partners every 30 days to keep your relationship fresh.

## Monitor Inbound Lead Sources

## Leverage Your Existing Contacts

## Networking Activities (Industry and Social)

### Evaluate Activity

### Conduct at Activities

### Follow Ups

## Making Contact With New Leads

### Research the Business/Contact

#### LinkedIn

#### Who should we be talking to?

#### Find a warm introduction

#### Identify and document significant properties or existing connections

### Send Marketing Materials

If Cold, then compile and send (paper, electronic) articles and useful info

### Initial Contact and Follow Ups

#### Voicemail/Gatekeeper Script

#### Follow Up

Follow ups should be done every 2-4 weeks, with a notice that you will check back in.

#### Live Person Script!!

Talk about services, fees, problems we solve, who we solve them for

## Qualify Lead or RFP (Determine If We Are A Fit)

### Qualifying Questions: Is the work being requested already in our list of service offerings? Can we do the work to the level of quality we would expect? Is it in our current business model? If not, is this a strategic shift we want to make long-term?

### Place Into Appropriate Group (Cold, Warm, Hot, Not a Fit)

# Finding The Opportunity

## Assess the Needs of a Geographic Area

## Follow Up With Qualified Leads

### Initiate first contact, with notice of follow up within a week by phone

### 2nd follow up, then flag contact for follow up 10 days from contact

### 3rdfollow up, notify that follow up will happen within 6 months and will be available if they call us

### Continue to reach out every 3 weeks

### If Contact Yes: set meeting and offer free 1 hour consultation

### If Contact No, flag to follow up 6 months later and remove from hunt list

### If Contact No, upon 6 month follow up research business and re-identify target

## Get the first meeting (in person or remote)

## First Discovery Meeting or Call

### Initial Interview Script

### Share values and discuss NEWCO

### Share previous projects

### Discover possible opportunities

## Responding to Requests For Proposals

### Contact the Opportunity

#### Generate Letter of Intent from template

#### Make schedule for team to respond in Basecamp (using dates from RFP)

Contacted, Pursuing, Submitted

### Research (lead conv)

#### Relationships that would help us better understand the client/opportunity

#### Other work the requestor has done before

#### Other examples of work/projects that are similar to the work requested

## Draft Recommendations and Get Direction

## Propose Work

### Client requests help with a provided recommendation

### Account Planning & Work Design

When this happens this early in the process, we need to be very discerning about who we qualify as a client as this can eat a lot of unbillable time.

#### Outline Time

#### Organize the People for the Project

#### Ideation Process

#### Determine Project Approach

### Generate the Proposal

#### Allow time for team review

#### Make sure the language is NEWCO Oriented if NEWCO is the lead

### Submit the Proposal

#### If responding to an RFP, must use the prescribed outline in the RFP (if supplied)

## Close The Opportunity

### (LOST) Mark opportunity as Lost and put into Lead process

### (WON) Mark opportunity as Won and onboard the client

#### Meet with Purchasing Department (Record All Meetings with Government)

Obtain Insurance Requirements for Team

Obtain Invoice Process

Request Confirmation Letter of the agreed upon terms in this meeting

If Sub-Contract – Understand the clear lines of communication between all parties, especially prime and government.

#### Ensure Contract and Letter of Agreement is Signed

#### Generate Invoices

To make sure we can easily forecast our cash flow, it helps to create all of the invoices for project work with appropriate billing dates.

# Doing The Work

## Project Setup

### Create Scope of Work and Upload to Basecamp

### Identify Team

### Initial Team Discussion

### Identify Project Lead

### Budget for Team times

People either are FTE, part-time (consultant) or part-time (set hours/wk). The deeper you assign time, the better you can be at estimating availability. Keeping it high level keeps it simpler

### Budget for Team Coordination Meetings

### Consultant Onboarding

Welcome Letter

Create emails

Create basecamp accounts and invite to join

Give instructions and overview on how to use tools if needed

Include Time tracking tools

Include Contractor Agreements

Obtain W-9 Form

Obtain Copy of Insurance (if needed)

### Obtain Project Team Commitments

### Add Team members to Basecamp

### Generate and Distribute Project Charter

### Conduct Project Kickoff Team with Key Project Players

### Fill out Resource utilization Sheet

To-Do Lists in Basecamp represent blocks of to-dos

milestones are events

### Produce Gantt Chart

### Set schedule for first month of project (meetings, allocated time)

## Project Management

### Ongoing Resource Optimization

### Update calendar with next month of meetings, allocated time

### Regular Check-ins with Project Team

### Regular Check-ins with Client

## Research

Specific methods or things to do?

## Analysis

Specific methods or things to do?

## Generate Deliverables

### Select Template For Use

### Review Template Draft

### Finalize deliverables

## Project Closeout

### Conduct Project Work Feedback Survey

# Client Renewal and Retention

## Regular Follow Ups

Check back with clients every 30 days to see how things are going.

Continue to provide new recommendations and remind of prior ones.

## Strategic Account Planning

This should be done quarterly for active, ongoing accounts. Use the prescribed template.

Review all or part of this plan with the team that participated on the project.

## Reviving a Dead/Inactive Account

This will require doing a strategic account plan. We must also reconnect with the proper buyers. This will likely take a bit o time to accomplish, so be persistent and polite and it will pay off eventually.

# Ongoing Education & Training

## Determine Appropriate Training

## Schedule Educational/Development Time

## Share Educational Observations

## Annual Idea Share

# Money Management

## Recording Activities and Time Use

## Accounts Receivable

### Review Invoices and Send Out Monthly

## Accounts Payable - Billing Admin

### Review Invoices and Send Out Monthly

## Taxes

### Monthly reconciliation of transactions for balance sheet

### Updating Chart of Accounts

## Cash Flow Management

### Review prior and upcoming 3 months at every monthly meeting.

## Forecasting and Projecting

### Sales should be forecasted out about 6-12 months, or whatever the sales cycle is.

# People Management

## Conflict Resolution

### The Five “Whys”

## Holding Ourselves Accountable

## Recruiting

## Onboarding People

## Maintain a Reliable Pool of Consultants

### Vet and onboard consultants into our pool

### Maintaining Relationships with our Partners (Consultants)

### Follow up with non-active, qualified consulants

## Terminating People

# NEWCO Strategy

## Run Meetings With Pre-Determined Agendas and Times

## Conduct Strategic Business Updates

### Daily

### Weekly

### Monthly

### Quarterly

### Yearly

## Evaluate and Select Strategic Business Partners

## Changing Our Processes

## Pivot Our Model

## Day management (Focus, Free, Buffer)