

## I. MONDAY – WEEK 1: ACTION ITEMS FOR GETTING STARTED

No.	ACTIONS TO BE TAKEN AND TOPICS TO BE DISCUSSED:	ASSESS		IMPLEMENT	
		Y	NA	P	DD
	<b>PRESIDENT/CEO ACTION ITEMS FOR TODAY</b>				
1.	Make an iron-clad, no-excuse, personal commitment to yourself that you and your staff will complete the “One Month Business Tune-up” process for the benefit of your company.				
2.	Schedule a staff meeting with your Management Team for tomorrow morning at 8:00 AM to discuss and review the “One Month Business Tune-up” process. Advise your staff that this will be a long meeting.				
3.	Distribute purchased copies of the “One Month Business Tune-up” Checklist to all the key personnel, department managers, and management team members participating in the tune-up process (this checklist is copyrighted). Also, provide a copy for each member of the company’s Board of Directors.				
4.	Schedule a staff meeting for Wednesday at 8:00 AM with the key members of the Marketing Team.				
5.	Schedule a staff meeting for Wednesday at 2:00 PM with the key members of the Finance Team.				
6.	Schedule a staff meeting for Thursday at 8:00 AM with the key members of the Sales Team.				
7.	Schedule a staff meeting for Thursday at 2:00 PM with the key members of the Customer Service Team.				
8.	Schedule a staff meeting for Friday at 8:00 AM with the key members of the Operations and/or IT Team, the Legal Team, and the Human Resources Team.				
9.	Schedule a staff meeting for Friday at 2:00 PM with the key members of both the Engineering and Manufacturing Teams.				
10.	Send a copy of the company’s current Vision Statement, Statement of Values, Ethics Statements, and Unique Selling Proposition/Statement of Benefits to all team members participating in the tune-up process.				
11.	Identify and write down what you believe are the top three obstacles to growth for your company.				
12.	Have the Senior Vice President of Sales be prepared to provide an update on the sales/revenue plan.				
13.	Assign a Finance Team member the task of listing the company’s entire portfolio of products and services in descending order based on their percentage contribution to total revenue. Make another list of the company’s entire portfolio of products and services in descending order based on their percentage contribution to profitability. Are they the same? If not, why not? Have the team member be prepared to present and discuss this at tomorrow’s Management Team meeting. This team member will both participate in an Inter-department Meeting (IDM) this Friday and will “chair” (IDM Chair) this meeting that includes a member of the Customer Service, Marketing, and Sales teams to further discuss this topic. The objective for the IDM is to develop a Strategy Paper entitled “Product Analysis” for the purpose of focusing the sales organization on selling the highest margin products and services and to eliminate unprofitable and/or slow-moving product lines. The IDM Chair will be prepared to present the results of this meeting at next week’s Management Team Meeting				

**I. MONDAY – WEEK 1: Action items for getting started continued ...**

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	<b>President/CEO Action Items for Today Continued ...</b>				
14.	Assign a Marketing Team member the task of assessing the customer base. Not all customers are created equal, and for various reasons, customers have different values to the company depending on quantity purchased, profit margin, payment history, or how difficult it is to consummate a transaction with them. Using a matrix, categorize all customers by “A”; Meets all the criteria of an ideal customer, “B”; Potential to meet all criteria of an “A” customer within one year, “C”; Below our standards, but possible to move to a “B” status within one year, “D”; Substantially below standard and needs to be eliminated as they have little value, and “E”; A previously lost customer who has the potential to be revived. Have the team member be prepared to present and discuss this at tomorrows Management Team meeting. This team member will both participate in a Market Opportunity Meeting (MOM) this Friday and will “chair” (MOM Chair) this meeting that includes a member of the Customer Service, and Sales teams to further discuss this topic. Have the MOM Chair be prepared to present this list at the next staff meeting. The objective for this process is to develop a Strategy Paper entitled “Market Opportunities” for the purpose of directing sales and marketing efforts.				
15.	Streamline your paper files and throw away information, articles, and brochures/ads you no longer need.				
16.	Clean off your desk and file everything that is not related to this “One-Month” action plan!				
17.	Delegate everything else that is not critical.				
18.	If you don’t have a Board of Directors, make forming a Management Advisory Committee for the purpose of exploring strategic alternatives an objective to be completed before the end of the month.				

## II. TUESDAY – WEEK 1: KICK-OFF MEETING WITH YOUR MANAGEMENT TEAM

No.	ACTIONS TO BE TAKEN AND TOPICS TO BE DISCUSSED:	ASSESS		IMPLEMENT	
		Y	NA	P	DD
	<b>MANAGEMENT TEAM MEETING</b>				
1.	The Management Team staff meeting starts precisely at 8:00 AM.				
2.	The primary purpose of this meeting is the “One Month Business Tune-up”. Emphasize the seriousness of your commitment to this process and its value to the company. Announce that you will “Kick-off” all the individual department meetings, but the department manager will chair all subsequent meetings.				
3.	Review each and every one of the action items in the “One Month Business Tune-up” for the purpose of identifying the action items that apply to your business – not all of them may apply (check off those items in the “NA” box).				
4.	For all the action items your staff has selected as crucial for success, identify both the internal and external resources that will be instrumental for completing the “One Month Business Tune-up” (collectively enter those names in the “RP” box).				
5.	Encourage all staff members to streamline their paper files and throw away information, articles, and brochures/ads they no longer need.				
6.	Encourage all staff members to clean off their desks and file everything that is not related to this “one-Month” action plan! Resolve all critical items this week and delegate everything else.				
7.	Encourage all team members to eliminate unproductive meetings within their departments.				
8.	Collectively review the company’s Vision Statement – is it still valid? If not, then discuss why. If the company doesn’t have a Vision Statement, then discuss what the Vision should be. Assign a team member the task of drafting a version of the updated and/or new Vision Statement and be prepared to present this draft at the next Management Team meeting.				
9.	Collectively review the company’s “Statement of Values” – is it still valid? If not, then discuss why. If the company doesn’t have a Statement of Values, then discuss what its values should be. Assign a team member the task of drafting a version of the updated and/or new values and be prepared to present this draft at the next Management Team meeting.				
10.	Collectively review the company’s “Unique Selling Proposition/Statement of Benefits” – is it still valid? If not, then discuss why. If the company doesn’t have a Unique Selling Proposition/Statement of Benefits, then discuss what the USP should be. Assign a team member the task of drafting a version of the updated and/or new USP and be prepared to present this draft at the next Management Team meeting.				
11.	Collectively review Section XXIX; Ethic’s Considerations as well as the Company’s Ethics Statements – are they still valid? If not, then discuss why. If the company doesn’t have an Ethics Statement, then discuss what its ethics should be. Assign a team member the task of drafting a version of the updated and/or new values and be prepared to present this draft at the next Management Team meeting.				

**II. TUESDAY – WEEK 1: Kick-off meeting with your Management Team continued ...**

No.	ACTIONS TO BE TAKEN AND TOPICS TO BE DISCUSSED:	ASSESS		IMPLEMENT	
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	<b>Management Team Meeting Continued ...</b>				
12.	Have each team member meet with their individual departments and develop a list of 10 ways to reduce costs and be prepared to present this list at the next Management Team meeting. The objective for this process is to develop a Strategy Paper entitled “Top Ten Ways to Reduce Costs” for the purpose of improving profitability.				
13.	Have each team member meet with their individual departments and develop a list of 5 opportunities to exploit and be prepared to present this list at the next Management Team meeting. The objective for this process is to develop a Strategy Paper entitled “Top Five Opportunities” for the purpose of focusing resources on high return projects.				
14.	Have each team member meet with their individual departments and develop a list of the top 3 obstacles to growth for the company and be prepared to present this list at the next Management Team meeting. The objective for this process is to develop a Strategy Paper entitled “Top Three Obstacles to Growth” for the purpose of accelerating growth.				
15.	Have the Senior Vice President of Sales present an update on the sales/revenue plan. If sales are not on goal, develop a plan to ensure sales goals will be met. Be prepared to present the first draft of the plan at the next Management Team meeting.				
16.	The IDM Chair will facilitate a review of the list of the company’s entire portfolio of products and services in descending order based on their percentage contribution to total revenue and the list of the company’s entire portfolio of products and services in descending order based on their percentage contribution to profitability. Are they the same? If not, discuss why. The IDM Chair will be prepared to present and discuss this analysis at Fridays IDM as well as be prepared to present the results of the IDM at next weeks Management Team meeting.				
17.	The MOM Chair will facilitate a review of the customer matrix. Discuss why certain customers may be categorized the way they are. The MOM Chair will be prepared to present and discuss this analysis at Fridays MOM as well as be prepared to present the results of the MOM at next weeks Management Team meeting.				
18.	Each Management Team member will call 5 customers every day this week (total of 20) to thank them for being a customer, and gather feedback on the company’s current products and services, industry trends, and future products and services the company could provide. Categorize this information and be prepared to present the findings at the next Management Team meeting. The objective of this process is to develop a Strategy Paper entitled “Customer Perspectives” for the purpose of using customer’s comments as a basis for discussion in all other department meetings, as part of the decision making process for directing sales and marketing efforts, and for engineering to develop new products.				
19.	Have the team members identify the worst employee in their department. Who on their staff, if they were terminated, would not make any difference or have any impact on sales, productivity, or operational efficiency? Identify this employee for the next staff meeting.				

**II. TUESDAY – WEEK 1: Kick-off meeting with your Management Team continued ...**

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	<b>Management Team Meeting Continued ...</b>				
20.	Go one step further! Have each department manager make five lists that include ALL of their employees. The “A” list is for excellent employees. The “B” list is for good/very good employees. The “C” list is for employees that have high potential to be a “B” within one year. The “D” list is for all the remaining necessary employees. The “E” list is for all under-performing and un-necessary employees. Have this list prepared for the next Management Team meeting. As this list is being created, stay “tuned in” to the development of the Strategy Papers for those employees who may/may not fit with future strategies and serving the customers of the future.				
21.	Schedule another Management Team meeting for next Monday morning at 8:00 AM.				
	<b>PRESIDENT/CEO ACTION ITEMS FOR TODAY</b>				
1.	Call 5 customers today to thank them for being a customer, and gather feedback on the company’s current products and services, industry trends, and future products and services the company could provide. Categorize this information and be prepared to present the findings at the next Management Team meeting.				
2.	Schedule the Inter-department Team meeting for this Friday.				
3.	Start calling potential Management Advisory Committee members and schedule appointments to meet with the candidates next week.				