



***“Energize your Business  
Development goals!”***

**Executive Manager’s Secrets  
for creating**

# **Profitable Action Plans**

***A workbook you can use to solve  
problems and seize opportunities!***

**by Mike Hayden, Founder Senior Management Services**

---

# **Executive Manager's Secrets for Profitable Action Plans**

---

Presented by

## **SENIOR MANAGEMENT SERVICES**

<http://www.SeniorManagementServices.com>

### **SENIOR MANAGEMENT SERVICES**

39270 Paseo Padre Pkwy., 439

Fremont, California 94538

(408) 817-5684

(952) 674-1767 Fax

12/6/05/sms321s klt prfrns srvy/

© 1991 Mike Hayden

**Table of Contents**

---

<b>Table of Contents.....</b>	<b>i</b>
<b>Executive Manager's Secrets for Profitable Action Plans.....</b>	<b>1</b>
Introduction.....	1
<b>How to complete your Workbook.....</b>	<b>3</b>
Key Areas.....	4
Management Development.....	5
Human Resource Development.....	6
Marketing Development.....	7
Operations Development.....	9
Miscellaneous Development.....	11
<b>Customer Centered Service Analysis Form.....</b>	<b>12</b>
<b>Other Needs, Frustrations, or Problem Situations.....</b>	<b>18</b>

## ***Executive Manager's Secrets for Profitable Action Plans***

---

### **Introduction**

Thank you for participation in our **Executive Manager's Secrets for Profitable Action Plans Workbook**. Use this workbook to prioritize your problems and opportunities and to quantify their impact on your current and future profits.

Each year we meet with scores of people in dozens of businesses. This workbook plays an essential part in that dialogue. We use it to create a foundation of understanding for the many successful relationships that evolve between our clients and us.

As you know, developing a company and its documentation is, at best, a complex effort. In fact, the way many businesses do it results in little more than an expensive disaster. We declare that such disasters, though increasingly prevalent in today's business community, are not only wasteful, but also mostly preventable. Our goals are to prevent such disasters, to help clients gain control, and to "take the pressure off" by developing a more rational and productive approach.

To achieve these goals, we have spent years researching and developing productive methods that are generalized, instead of myopically specialized. From our research and practical application, we've developed a system we believe to be unequalled. This is the service we have developed for our client companies.

The result is that our clients can take advantage of an entire system that has already been validated in many other companies.

Should you choose, we can meet to discuss how we can apply our proven principles to your business. In that case, this **Profitable Action Plans Workbook** will serve as an agenda for our meeting.

It will help us better understand your concerns and goals. Should they be compatible with ours, we will explain the next step to take for a potential relationship between us.

*Mike Hayden*

### **SENIOR MANAGEMENT SERVICES**

"Our clients know what they're doing."

<http://www.SeniorManagementServices.com>

## **Executive Manager's Secrets for Profitable Action Plans**

As you analyze your requirements, certain needs will become apparent to you. While you may find them obvious, someone else may not.

To harvest the greatest possible understanding of your requirements, we suggest that you fill out this whole document. Your responses are confidential, and they will be kept confidential should you reveal them to us. (We consider all communication between us confidential.)

We have divided your workbook into these **key areas**:

- Management Development
- Human Resource Development
- Marketing Development
- Operations Development

If any item in this document seems unclear or causes some confusion, please don't be concerned. Simply give answers to your own satisfaction. You decide. **This is not a test.** Rather, it is a statement of your concerns and what you would like to address and solve.

We don't pretend to address all possible preferences in this brief Workbook. We encourage you to add any we have not addressed.

Thank You.

<http://www.SeniorManagementServices.com>

### ***How to complete your Workbook***

You will be **force-ranking** the key areas and associated items within each area, by their order of preference to you.

Therefore, you will be evaluating three important facts:

- Those key areas of development that are **important to you**;
- Which items within those areas you believe are relevant; and,
- The sequence you would like the major areas and items handled.

You will find parentheses “( )” next to each item, asking you to decide if that particular item is needed in your business. If so, indicate its **priority** relative to other items your business requires. For example, write the number “1” in within the parenthesis next to the **most urgent items**; for the next-most important, write the number “2”, the third-most number “3”, etc.

**YOU DO NOT HAVE TO PLACE A NUMBER NEXT TO EVERY ENTRY**, only those you think your business needs.

As you begin each major section, restart with number “1” to restart the force-ranking.

The “**MISCELLANEOUS**” page is reserved for additional entries important to you but not identified by this document. Be sure to force rank your own entries.

Please turn the page and begin.

### **Key Areas**

Starting with number “1”, representing the most urgent need, the priorities **diminish** as the numbers go higher.

Please do not use the same number more than once within a single general category.

You are not committing yourself to the sequence you establish, since this is only a statement of your preferences at this time.

Please force-rank the following items according to most urgent need, starting with “1”.

- ( ) Management Development
- ( ) Human Resource Development
- ( ) Marketing Development
- ( ) Operations Development

### Management Development

Please force-rank the following items according to most urgent need, starting with "1".

Item	Potential Profit	Potential Savings
( ) Eliminate bottleneck(s) in production		
( ) Develop skills training program for employees		
( ) Develop lesson plans for training program(s)		
( ) Develop Operations Manuals and job descriptions		
( ) Develop employee motivation program		
( ) Improve current training program		
( ) Increase employee production		
( ) Develop a working Organization Chart		
( ) Define line/staff relationships		
( ) Define employee positions, levels, and functions		
( ) Develop a system for distributing and retrieving operations manuals		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
<b>TOTAL</b>		

### Human Resource Development

Please force-rank the following items according to most urgent need, starting with "1".

Item	Potential Profit	Potential Savings
( ) Develop system for managing time, things, events, and people		
( ) Develop system to capture ideas and take/delegate action		
( ) Train employees in time management system		
( ) Develop system to minimize schedules slipping		
( ) Develop employees communication skills		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
<b>TOTAL</b>		

**Marketing Development**

Please force-rank the following items according to most urgent need, starting with "1".

Item	Potential Profit	Potential Savings
( ) Improve "sales-ability" of marketing materials		
( ) Reduce costs of producing marketing materials		
( ) Develop system to test marketing materials		
( ) Define central model consumer		
( ) Develop telephone marketing system		
( ) Coordinate telephone marketing with mail / advertising campaign		
( ) Analyze competitive marketing materials		
( ) Develop Unique Selling Proposition		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
<b>TOTAL</b>		

Please force-rank the following items according to most urgent need, starting with "1".

Item	Potential Profit	Potential Savings
( ) Salesletter		
( ) Newsletter		
( ) Product Bulletin		
( ) Brochure		
( ) Customer Application		
( ) Magazine Article		
( ) Press Release		
( ) Trade Show Material		
( ) Annual Report		
( ) Ad Copy		
( ) Proposal		
( ) Direct Mail Sales Literature		
( ) Telephone Sales Script		
( ) Slide Presentation Script		
( ) Public Relations Material		
( ) Competitive Analysis Report		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
<b>TOTAL</b>		

### Operations Development

Please force-rank the following items according to most urgent need, starting with "1".

Item	Potential Profit	Potential Savings
<b>Develop systems to:</b>		
( ) Collect, assemble, and publish technical information		
( ) Streamline documentation process		
( ) Track time and money spent on documentation		
( ) Update manuscripts in timely fashion		
( ) Improve turnaround time on documentation		
( ) Document systems and procedures		
( ) Develop project forecasting and scheduling system		
( ) Develop documentation standards		
( ) Improve appearance of publications		
( ) Develop system to keep publications up-to-date with technical advances		
( ) Integrate documentation with product development		
( ) Accelerate product development		
( ) Develop system for technical research and information gathering		
( ) Minimize inventories of printed information		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
<b>TOTAL</b>		

Please force-rank the following items according to most urgent need, starting with "1".

Item	Potential Profit	Potential Savings
( ) Research Report		
( ) Engineering Documentation		
( ) Technical Manual		
( ) User Guide		
( ) Computer Software Documentation		
( ) "How-To" Instruction Manual		
( ) Design Specification		
( ) Computer Hardware Documentation		
( ) Training Manual		
( ) Corporate Planning Brief		
( ) Competitive Analysis Report		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
( ) Other		
<b>TOTAL</b>		

**Miscellaneous Development**

This page is reserved for additional entries important to you but not identified by this document.

Please force-rank the following items according to most urgent need, starting with "1".

Item	Potential Profit	Potential Savings
()		
()		
()		
()		
()		
()		
()		
()		
()		
()		
()		
()		
()		
()		
()		
()		
()		
()		
<b>TOTAL</b>		

### **Customer Centered Service Analysis Form**

Identify your, frustrations, and problem situations for which your product or service is appropriate - from your point of view.

Run down the list quickly “scoring each item or idea” as you go. Use your first impulses only, your “gut reaction”, quickly score each line and move on the next. Take a maximum of 5 minutes. Score each one as follows (you may indicate “0” by leaving it blank):

0 = doesn't really apply

1 = some benefit

2 = extra benefit

3 = super benefit

<b>Improve or Enhance:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
( ) decision making capability		
( ) profits		
( ) cash flow position		
( ) internal operations		
( ) public product image		
( ) quality, reliability, effectiveness of software		
( ) usefulness and relevance of documentation		
( ) operating efficiency and productivity		
( ) understanding of costs		
( ) information for decisions		
( ) user service needs		
( ) competitive capabilities		
( ) employee morale and motivation		
( ) employee safety		
( ) market penetration		
( ) credibility of role in community		
( ) user orientation of software		
( ) service to particular groups or users		
( ) inherent advantages		
( ) competitive edge		
( ) utilization of equipment and facilities		

( ) employee morale and motivation		
( ) organizational image		
( ) technical understanding of problem		
( ) existing strengths and image		
( ) status in peer group		
( ) existing skills		
( ) cash flow		
( ) profitability		
( ) accounting procedures		
( ) operations		
( ) revenues		
( ) internal control		
( ) internal reporting		
<b>TOTAL</b>		

<b>Reduce, Relieve, Or Eliminate:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
( ) number of internal and external conflicts		
( ) costs		
( ) deficits		
( ) skills levels requirements		
( ) service delays and unreliability		
( ) excess capacity		
( ) idle equipment time		
( ) peaking of demands		
( ) risk		
( ) waste		
( ) inefficiency		
( ) conflict		
( ) congestion		
( ) public pressure and adverse opinions		
( ) recurring problems		
( ) future cost		
( ) pressure and tension		
( ) organization conflicts		
( ) blockages to staff development		
( ) inefficiencies and waste		
( ) conflict		
( ) constraints		
( ) adverse criticism		
( ) low cost-benefit ratios		
( ) deficits		
( ) pilferage and internal security problems		
( ) unnecessary costs		
( ) exposure to loss		
( ) paperwork		
( ) bottlenecks		
( ) investment debt		
( ) material errors		

( ) errors		
<b>TOTAL</b>		

<b>Protect:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
( ) reputation and integrity		
( ) independence		
( ) market position and market share		
( ) security of product served		
( ) proprietary information		
( ) integrity and public image		
( ) self-interests		
( ) assets		
( ) credibility		
( ) reputation		
( ) profit		
( ) lines of credit		
( ) liquidity		
<b>TOTAL</b>		

<b>Restructure:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
( ) organization		
( ) current operations		
( ) planning process		
( ) compensation and incentive program		
( ) internal operations		
( ) technical approach		
( ) marketing approach		
( ) quality of reporting system		
( ) unprofitable operations		
( ) unnecessary reports		
( ) branch operations		
<b>TOTAL</b>		

<b>Identity:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
( ) strategies		
( ) key problem areas		
( ) decision factors		
( ) solutions to problem areas		
( ) needs		
( ) alternatives or options		
( ) constraints or limits		
( ) potentials		
<b>TOTAL</b>		

<b>Develop or Install:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
( ) external reporting		
( ) management information system		
( ) cost systems		
( ) decision-making model		
<b>TOTAL</b>		

<b>Restore, Resolve, or Revitalize:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
( ) role of organization in community		
( ) profitable operations		
( ) standardized development process		
( ) deteriorating facilities and equipment		
( ) markets, competitive edge, and profits		
( ) management structure		
( ) employee morale and motivation		
( ) market penetration		
( ) outdated skills		
( ) cash flow		
( ) image		
( ) reliability of financial statements		
( ) resolve backlogs, uncertainty, inefficiencies, management anxiety		
<b>TOTAL</b>		

**Other Needs, Frustrations, or Problem Situations**

Please identify any other needs, frustrations, and problem situations for which your product or service is appropriate.

In each area, identify how the service applies. For example, under the word "Eliminate" you might put "unnecessary forms and procedures."

<b>Improve or Enhance:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
()		
()		
()		
()		
<b>TOTAL</b>		

<b>Reduce, Relieve, or Eliminate:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
()		
()		
()		
()		
<b>TOTAL</b>		

<b>Protect:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
()		
()		
()		
()		
<b>TOTAL</b>		



CLIENT PREFERENCE SURVEY  
Customer Centered Service Analysis Form  
Page 19

<b>Restructure:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
()		
()		
()		
()		
<b>TOTAL</b>		

<b>Identify:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
()		
()		
()		
()		
<b>TOTAL</b>		

<b>Develop or Install:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
()		
()		
()		
()		
<b>TOTAL</b>		

<b>Restore, Resolve, or Revitalize:</b>	<b>Potential Profit</b>	<b>Potential Savings</b>
()		
()		
()		
()		
<b>TOTAL</b>		