

Business Planning Executive Summary

Company History

- brief overview on when company was founded, how the company evolved, and current status

General Management

- brief overview on planning, organizational structure, provision of resources, leadership, succession planning

Marketing

- brief description of various markets served; distribution network

Sales Management

- brief overview on customer make-up, sales strategies, advertising, promotions

Pricing

- brief overview on pricing strategies for various market segments relative to competition

Products

- brief description of range of products and services offered, new product development

Infrastructure

- brief overview of plants, sq.ft., locations, equipment, support systems

Operations Performance

- brief overview on layout, automation, process flow, inventory management, scheduling

Personnel

- brief overview on recruitment, training, compensation, benefits, employee relations

Quality and Environmental Management Systems

- brief overview on system upgrade, implementation to certifications in 2001

Financial Management

- brief overview on planning, budgeting, taxation, accounting, costing

Details Template

General Management

- business structure; ownership; parent company relationship; divisional relationship, accountability and autonomy
- planning-establish mission statement, goals, objectives, policies, processes
- organizational structure-establish duties, responsibilities, authorities, inter-relationships between various functional levels and divisions
- provision of resources-provide capital, labor, training, time, materials to achieve desired objectives
- leadership-establish methods for timely and effective decision making, communication, and deployment
- succession planning-establish chain of command, planning for transition
- Internal communication channels for deployment of strategies, tactics and performance feedback
- Customer focus; processes to understand and deploy customer contractual requirements. Have product realization processes; management and support processes; quality management processes and interfaces with outsourced processes.

Market Analysis

- details of the various markets served (automotive, industrial, etc.)
- products and services offered in each market segment
- Organizations strengths and weaknesses in each market segment
- end use of products
- % market share in various markets or industry sectors
- current market trends in each market segment
- competitors in each market segment; their strengths and weaknesses
- gathering competitor data/information (products and companies)
- opportunities for growth in each market segment
- branding and packaging-strategies to ensure brand recognition vs. customer branding and competitor brands
- channels of distribution (dealers, OEM's, warehouses, agents, distributors)
- geographical/regional market development
- customer satisfaction plans-mail surveys, phone surveys, sales calls; review and take action to improve
- growth objectives for each market segment
- short term and long term timeframe to achieve objectives
- strategies to achieve growth objectives in each segment

- **Knowledge of the market** - Intelligence & research; total market size and market penetration; trends and indicators; sources of information; identification of new opportunities and growth plans.
[design control; contract review]
- **Knowledge of customers** - buying habits, preferences, key personnel, financial stability; diverse, not dependent on a few; present and future product applications; present and new customer development.
[design control; contract review]
- **Competitors** - Identify and gather data on market share and customers; products and services; pricing; marketing strategies; successes and failures.
- **Marketing plan** - short and long term objectives and planning for growth in market share; implementation plans.
- **Channels of Distribution** - identification; selection and use; advantages & disadvantages
- **Branding and packaging** - create brand recognition consistent with company image and reputation; selection and use of improved packaging materials and methods; convenience and functionality; comparison with competitors.

Sales Management

- major customers and their buying patterns (seasonal, regular, etc.)
- new customer development-initiatives
- sales management-sales force, sales techniques, territories, customer contact, call frequency, sales quotas, presentation and reporting
- training-product, sales techniques, closing, competition
- advertising and sales promotions-company image, brand recognition, media, effectiveness
- after sales service-customer support, warranty, customer training
- short term and long term sales objectives
- strategies to achieve sales objectives
- costs; comparison to competitors; coverage and penetration.
- **Sales Forecasts** - short and long term; by product lines; sources of information; frequency of review & update; use of leading edge techniques; relate to planning of production facilities, manpower planning and budget preparation. [contract review; production control]
- **Sales Management** - identification of sales activities and responsibilities; budgets and quotas; size of sales force; frequency of customer visits and coverage; allocation of territories and product lines; presentation planning and

training; sales equipment and supplies; sales reporting and performance evaluation.

- **Advertising and Promotion** - identification of appropriate company and product image; selection of media; coordination with selling effort; evaluation of impact on sales.
- **After-sales Service** - inform customer on use, operation and maintenance of products; clear policies on product warranty, returns and replacements; availability of spare parts and repair facilities; handling of customer complaints; trained and knowledgeable customer service dept; corrective action procedures; comparison with competitors.
[contract review; servicing]

Pricing

- direct cost to manufacture
- overhead costs
- profit contributions
- pricing and discount strategies
- benchmarking to competitor costs
- short term and long term cost and pricing objectives
- strategies to achieve cost and pricing objectives relative to demand in each market segment
- **Pricing** - knowledge of competitors selling prices and discounts; alertness to pricing changes in the marketplace; direct product manufacturing costs; impact of pricing changes on sales volumes. [contract review]

Products

- product lines, types, range
- tie-in to requirements of various market segments
- future trends in products
- new product design and development-frequency and range
- benchmarking of products to competition and market research
- consideration of packaging issues
- evaluation of existing product lines-strengths and weaknesses, growth and profitability potential
- technical and market research for new product opportunities
- short term and long term product development objectives
- strategies to achieve product development objectives
- **Products** - frequency of new product introduction; discontinuation of unprofitable and obsolete products; reevaluation of profit and growth potential of

current products; fluctuation and seasonality of demand; comparison with competitor's products; sources and identification of new product ideas, development and needs.

[quality policy; design control; id & traceability]

Infrastructure

- plant-capacity, locations, support services, accessibility, etc.
- workspace-capacity, ergonomics (physical and human factors), housekeeping, employee motivation
- equipment-capability, capacity, maintenance and other support services
- tooling-capability, capacity, support services
- communications-media, scope, consider e-mail, fax, voice mail, internet, etc.
- transport-fleet capacity, range, maintenance costs, etc.
- information systems-hardware, software, applications, training
- environmental issues-risk analysis, conservation, pollution, waste, recycling
- short term and long term infrastructure objectives
- strategies to achieve infrastructure objectives

For each of the above consider requirements, availability, capital spending, environmental, health and safety, security.

Operational Performance

- production technology-research, equipment, benchmarking, trade shows
- plant layout-process flow, location of support services, minimal material travel, storage
- automation-robotics, PLC's, computerization
- material handling-equipment, labor, frequency of movement, suitability
- production planning and control-scheduling, materials availability, labor availability, machine utilization, techniques used, communication
- inventory control-tracking, storage, management, turnover
- short term and long term operational performance objectives
- strategies to achieve operational performance objectives; use of six sigma, lean manufacturing; theory of constraints, kanban, etc

Personnel

- recruitment-sourcing, screening, hiring, competency requirements
- training-identification, delivery, effectiveness

- compensation-salary, benefits, incentives (hoagie days, dollar meals), holidays and other time off
- benchmarking against competitors
- employee services-medical center, tuition reimbursement, counseling, other social services
- management and supervisory development
- employee relations-recognition, work environment, communication, empowerment, motivation, safety and security, hours, suggestion committee, complaints, disciplinary actions, policies relating to smoking, drugs, discrimination, feedback.
- short term and long term personnel objectives
- strategies to achieve personnel objectives

Quality and Environmental Management Systems

- management system upgrade to -ISO 9001:2000, QS-9000, ISO/TS 16949, ISO 14001
- timing, resources, outside assistance
- documentation, implementation, and training
- short term and long term system (quality and environmental) objectives-product, process, system
- strategies to achieve system (quality and environmental) objectives

Financial Management

- financial planning-capital requirements, capital sourcing, rates of return, profit objectives, capital distribution, banking relationships, return on capital
- financial accounting-computerized systems, reports, timeliness, communication, audits, projected financial statements (1-3 years)
- cost accounting- systems and methods, cost accumulation, break-even analysis
- cash management-cash flow forecasts, short term financing, collections, disbursements
- budgeting-annual, tracking, analysis and reporting
- credit management-policies, tracking, accounts receivable aging, collections
- asset and risk management-property loss, business interruption, legal liability, etc., insurance, contingency planning
- tax management-planning, interpretation, deferral, federal-state-municipal, reporting-filing
- short term and long term financial management objectives
- strategies to achieve financial management objectives

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