



STEP	IMPORTANT INFORMATION
<b>1 PRE-PACKAGE</b> Client Application Company Information	Strategic issues to be addressed Org chart / outside resources you currently use/retain Company history Balance sheet / P&L
<b>2 BIG PICTURE</b> Company Solution Hedgehog Concept Future Most Important Concern	What is the market need? What is your Vision / Mission / Purpose? What are your products and/or services? What is your target market, size and segment? What are you deeply passionate about? What do you do best? What is your core focus? What is your exit strategy? What keeps you up at night?
<b>3 BIZ MODEL</b> Competitors & Differentiation (Secret Sauce) Customer Needs Go-to-market Strategy Environmental Factors SWOT Analysis Core Economics/Financial Realities Business Feasibility	What differentiates you from your competition? Is that "secret sauce" sustainable? Do you have adequate information re: customer cost drivers & relative profitability How do you acquire customers - marketing and sales? What is your distribution - partners, channels, e-commerce? Do you have a strategy built around environmental factors? Describe your strengths, weaknesses, opportunities and threats. Which opportunities/threats present the most pivotal inflection points for your future success? Are you satisfied with your financial performance and current trends? How do you make money/revenue and profit by product/service?
<b>4 THE TEAM</b> Effectiveness of Team Members Effectiveness of Org Structure	Who do you rely upon the most today? Where do you need to apply additional resources? Should you hire or outsource them?
<b>5 OPERATIONS</b> Functional Areas - Finance / Manufacturing / Sales / Marketing / Operations / etc.	What are the major buckets of functional activities to drive the business forward? How do you measure functional effectiveness "KPIs"?
<b>6 BIZ PLANS</b> "Success" Definition Strategies Scorecard/ Dashboard Metrics	What are your business objectives and measurements? What do you want your business to look like in 3 – 10 years? What changes do you need to make to get there?
<b>7 WRAP UP</b> Presentation development Rehearsals CRT Presentation Final Report & follow-up meeting	Use CRT presentation templates (Midterm and Final versions) Focus on new input and suggestions following CRT Presentation in Final Report; develop Client Action Plan to address all priorities