Using XYZ Resources To Help Grow By Test Making in _____

1. To be recognized in (major geographical market area in US) for providing unique XYZ activities and services

2. To get 10,000 hits on our XYZ website from (target area) by (deadline)

3. To open up a "**Commanding Presence**" in (target area) by year end _____
   ➢   1,500 Level B customers & 15 Level A contracts

4. To use XYZ, training and consulting as a "door opener" for bigger business

5. To open up opportunities we may or may not see at this time

6. To "reach" 100,000 new Level B customers by the end of this decade

Purpose of Our Planning Sessions
Theme: Jump start XYZ

Part 1	To develop a Business "Model" / Roadmap
Part 2	To develop 4-6 key approaches for establishing a "Commanding Presence" in target area
Part 3	To get a "working draft" ABC proposal
Part 4	To develop a plan to get customer feedback on XYZ
Part 5	To analyze the 3 vendors for getting XYZ's name to the market
Part 6	To figure out how to get consultants time "100 % billable"
Part 7	To calculate 3-5 critical metrics to track for success
Part 8	To walk away with specific Marching Orders Part A (Action Plan) plus a Part B (Communications Plan)

Non-Purpose:

To dwell on the past

To spend time on the content of XYZ

To go outside target area except for work on ABC

Business "Model" / Map / Compass

Part 1

A business model is "what a business does and how a business makes money doing those things

Option 1	Option 2	Option 3	Option 4	CONCLUSION
Key Elements	**Key Elements**	**Key Elements**	**Key Elements**	
# 1 What business are we in - Really in	# 1	# 1	# 1	
# 2	# 2	# 2	# 2	
# 3	# 3	# 3	# 3	
How payment system works	How payment system works	How payment system works	How payment system works	
$$$	$$$	$$$	$$$	

Part 2-b

Establishing a "Commanding Presence "in Target Area by year end _____

1. Who do we Absolutely need know in _____?	2.How will we do it?	3. How to blast open _____ with XYZ?	4. Ways to make XYZ the talk of _____?

5. How to build awareness about XYZ with

Audience	Audience
Audience	Audience

6. Ways to build awareness about XYZ with

Audience	Audience
Audience	Audience

7. Ways to build "raving fans for XYZ among

Audience	Audience
Audience	Audience

8. Who do we know in _____ who can help us blast open the _____market?

9. What media do we want to work with in _____?

Part 2-c

Establishing a "Commanding Presence "in Target Area by year end _____

10. How do we use XYZ to build a "COMMANDING PRESENCE" with…

a. Future contracts	b. Potential Buy-Outs	c. Potential Partners	d. _____ s	e, _____	f. _____

11. Ways to use outbound marketing

12. Ways to use inbound marketing

13. Ways to use combined inbound and outbound marketing

14. How do we maximize our consultants "billable" time doing _____

15. What Media do we want to work with in _____

16. Fast, cheap and easy ways to make XYZ known in _____ with the right people

17. What "tables" do we want to be sitting at in _____

18. Six month costs for DOING expansion test

Part 2-d

Proposal	Contribution To Purpose	Costs (out of pocket) Start-Up Low < $___ Med $___ to $___ High > $___ On-Going Low < $___ Med $___ to $___ High > $___	Time (payroll/ or consulting) Start-Up Low <___ hours Med ___ to ___ High >___ hours On-Going Low <___ hours Med ___ to ___ High >___ hours	Major impacts on the organization (+ & -)	Difficulty (implementation) Start-Up Low Medium High On-Going Low Medium High	Major Side effects (+ & -) Primary, Secondary, Tertiary
Option #1						
Option #2						
Option #3						

The McNellis Decision Assist Grid™

ABC Funding

So what

What is our PRODUCT	What REALLY is our PRODUCT	Why Is it Important	Our Goal for the Future	How will we keep it ROBUST

How much will it cost

How much will it REALLY cost

Sources of Income

Year 1	Year 1	Year 1	Year 1	Year 1

Income

Expense

Net

Part 4

Getting Customer Feedback

What information do we want to collect	Task	Who Will Do it	Expected Result	Deadline
Positive Feedback	Develop a format	Consultant	Develop a format	Date
Difficulty w/ System	Contact 2 schools	Consultant	Completed format interview report	Date
Suggestions for Improvement	Task	Name	Specific Result	Date
Ways to market the XYZ	Task	Name	Specific Result	Date

Part 5

Proposal	Contribution To Purpose	Costs (out of pocket)	Time (payroll/ or consulting)	Major impacts on the organization (+ & -)	Difficulty (implementation)	Major Side effects (+ & -) Primary, Secondary, Tertiary
		Start-Up Low < $___ Med $___ to $___ High > $___	**Start-Up** Low <___ hours Med ___ to ___ High >___ hours		**Start-Up** Low Medium High	
		On-Going Low < $___ Med $___ to $___ High > $___	**On-Going** Low <___ hours Med ___ to ___ High >___ hours		**On-Going** Low Medium High	
Option #1						
Option #2						
Option #3						

The McNellis Decision Assist Grid™

Part 7

Measuring Our 6 Month Effectiveness

# Hits on XYZ Website	# Hits of XYZ Life Resources Website	# Potential " buyers" (based on business model)
Goal / Actual Results	Goal / Actual Results	Goal / Actual Results
Future Contracts	Potential Buy Outs	??????
Goal / Actual Results	Goal / Actual Results	Goal / Actual Results

Action Plan For Next Two Weeks

Tasks	Who will do it/ Deadline	Expected Results	Status Update	Tasks	Who will do it/ Deadline	Expected Results	Status Update

Communications Plan

Specific Messages	Who Needs To Know	What They Need To Know	Who Will Tell Them	How Will We Tell Them	Deadline
1. Message	Trustees	1,2,4	Name	Method	Date
2. Message	Audience	1,4,6	Name	Method	Date
3. Message	Audience	2,4	Name	Method	Date
4. Message	Audience	1,2,6	Name	Method	Date
5. Message					
6. Message					