



**CXO Partnering Handouts**  
**“Are You a Valued Resource or a  
Victim of the Economy?”**

**Prepare →**

**Align →**

**Engage →**

**Communicate**

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## Prepare

- Company publications
  - Articles
  - Executive speeches
  - Analyst reports
  - Industry reports
  - Competitors information
  - Social Networks → current and former employees
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- Analysis to determine: (1) their goals, strategies, processes, initiatives, business issues and (2) solutions you can provide

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## Align

# CXO Strategic Recovery



- Focused on key goals
- Cash Management
- Adjust strategy
- Customer intimacy
- New opportunities and approaches

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# Alignment Matrix

## Goals

- Cash Flow
- Profit
- Revenue
- Market Share

## Strategies

- Cash Management
- Asset Usage
- Leverage
- Product Dev. Management
- Customer Support
- Restructure
- Costs
- Skills
- Price
- Acquisition
- Image
- Channels
- Production
- Enabling Infrastructure

## Processes

- Performance Management
- Business Planning
- Sourcing
- Product Dev.
- Production
- Quality Mgt.
- Collections
- Distribution
- Marketing
- Sales Forecasting
- Sales Analysis
- Order Fulfillment
- Customer Service
- Customer Relations
- Customer Creation

## Initiatives

- Initiative #1
- Initiative #2
- #3
- #4
- #5
- #6

## Solutions

- Your consulting methodology, advice, etc.

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-  
-  
-  
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Source of Matrix: Knowledge Advantage Inc. Peterson Associates

**Align****PMI Matrix Assessment Tool**

	<b>Areas of Pain</b>	<b>Fear/ Anxiety</b>	<b>Measurement Methods</b>	<b>Improvement Solution</b>
<b>Financial</b>				
<b>Strategic</b>				
<b>Personal</b>				

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## Getting Engaged Vs. Hired

### Getting Hired—Time-Based

- Daily or hourly rate
- Focused on deliverables
- Usually arranged with 1<sup>st</sup> or 2<sup>nd</sup> level management
- Client defines tasks and rates → get's consultant agreement
- Focused on consultant's "ability to do"
- Fees based on competitive rates



### Getting Engaged—Value-Based

- Value-based fee
- Focused on improved outcome solution for client
- Usually arranged with/for CXO
- Consultant defines engagement and value-based fee → gets client agreement
- Focus on client's ability to improve
- Fee is based on outcome value to client

Source: "Value Based Fees—How to Charge and Get What You're Worth, Alan Weiss  
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## Engage Consulting Proposal Template

<b>Situation Appraisal</b>	General environment <b>PAINS</b>
<b>Objectives</b>	<b>GAINS</b> in client improvement
<b>Metrics</b>	How Client will measure success
<b>Value</b>	<b>GAINS</b>
<b>Methodologies and Options</b>	<b>CLAIMS</b> Plus their options
<b>Timing</b>	Start/completion
<b>Accountabilities</b>	Who provides what
<b>Terms and Conditions</b>	Payment, Code of Ethics reference, etc.
<b>Acceptance</b>	Signature block

Source of proposal components: *How To Write a Proposal That's Accepted Every Time*, Alan Weiss

## CXO Partnering Action Planning


### 1. PMI Matrix: Prepare/Align Exercise:

	Areas of Pain	Fear/ Anxiety	Measurement Methods	Improvement Solution
Financial				
Strategic				
Personal				

### 2. Action Plan to Validate #1, Engage and Communicate

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## CXO Communication

- Stay bungie-connected to  CXOs
- Join the CXO team:
  - Staff meetings
  - Planning sessions
  - Advisory Board
  - Drop-ins
  - Invitations
  - Help find resources
  - Take a part-time, interim role
- Monthly recap
- Pass-along information



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# Thank You!

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# PMI Matrix Tool: For each of your prospects or clients, profile the situation by circling/checking areas in the matrix:

1. What are your client's **PAINS** (column two)?
2. What are your client's resulting **FEARS or ANXIETY** (column three)?
3. How you would **MEASURE** the extent of this PAIN (column four)?
4. What improvement **SOLUTION** would you provide? (column five)?
5. Please add any other PAIN, FEAR, MEASUREMENT, or SOLUTION descriptions that are needed.

## PMI Assessment Tool: Client Pain, Measurement, and Improvement

	<b>Areas of Pain &amp; Tension</b>	<b>Fear/Anxiety</b>	<b>Measurement Methods</b>	<b>Improvement Solution</b>
<b>Financial</b>	Lack of cash (funds) Poor profit Low ROI, low ROA Low revenues Legal problems, risks	Loss of money	Financial reporting Data analysis ROI, ROA, analysis Dash boards Damage/design fault analysis	Financial controls Cash management Profit improvement Strategy improvement Expert witness, settlement
<b>Strategic</b>	Lack of clear direction, alignment Audit or regulatory non-compliance Delivery delays Product development delays Poor product quality Market share dropping Lack of business opportunity Lack of company agility Poor asset usage Poor leverage of resources Poor customer support Costs increasing Pricing strategy problems Poor image in market Poor acquisition strategy Inadequate distribution channels Inadequate enabling infrastructure	Loss of business control	Regulatory or compliance Alerts (SOX, FDA, ISO) Audits Market benchmarks/Studies Analyst reports Customer complaints Customer surveys Mappings Feasibility studies Engineering analysis/review Impact surveys Competitive analysis Customer value analysis Internal reporting Dashboard reports Customer complaints	Strategy formation Strategic planning and implementation Scorecard TQM, ISO, Baldrige Workshops Training Process/design improvement Customer focus groups Customer collaboration Risk management plan Change management Turnaround help Crisis management Project management Performance mgt.
<b>Personal</b>	Poor attitude, lack of motivation High stress or discomfort High risk Not respected by peers Insufficient budget Unlikely bonus, raise, or promotion	Loss of personal control	Employee complaints Employee surveys Confidential discussions Leadership assessments Skill assessments Capability gap review	Board development Coaching and Mentoring Interim management Training Organizational dev. Team building