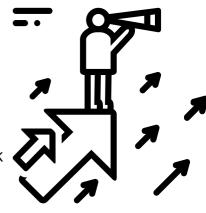
#### **BPA's Business Roadmap**

#### Day 1 - Corporate Governance: 10am - 12pm

- Corporate Governance
  - Establish the vision
    - Create the 10, 5, and 1 year vision statement for the company
  - Establish the mission statement
    - What are the main strategies and tactics that the company will use to fulfill the vision
  - o Establish the core values and corporate culture framework
    - What are the guiding principles that will help your organization stick with the mission statement and vision



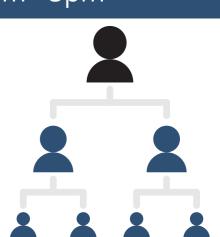
#### Day 1 - Marketing Management: 12:30pm - 2:30pm

- Target Market
  - Establish the niche
    - What are the demographics (age, salary, education, likes, dislikes, career)
- Core Business Message
  - Unique offer proposition
  - Lead Generators
- Marketing Analytics
  - Set up Key Performance Metrics



# Day 1 - Organizational Management: 2:45pm - 5pm

- Create the Organizational Chart
  - Define roles
  - Create responsibilities
  - Provide benchmarks
  - Company value check
  - Company Understanding Report Card
- How to run meetings
  - Meeting flow
  - Business dashboard



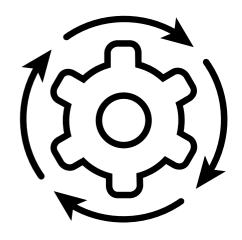
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### **Grow With Joe Business Roadmap**

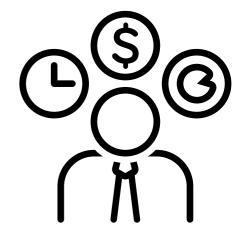
#### Day 2 - Operational Management: 10am - 12pm

- Standard Operations
  - Documentation
  - Error Log
  - Storage
- Data Collection
  - Databases
  - Systems
  - Security
- Porter's Value Chain
  - Department Value Analysis
  - Operational inefficiencies and bottlenecks



#### Day 2 - Corporate Entreprenuership12:30pm - 2:30pm

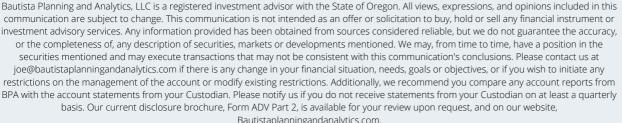
- Four Models of Corporate Entrepreneurship
  - How teams within an established company conceive, foster, launch and manage a new business that is distinct from the parent company but leverages the parent's assets, market position, capabilities or other resources.
- **Entrepreneurial Orientation** 
  - The strategy-making practices that businesses use to identify and launch corporate ventures.



# Day 2 - Human Resource Management 2:45pm - 5pm

- Career Tracks
  - Employee Motivation
  - Human Capital Improvements
  - Work Load Capacity
- Recruiting and retaining talent
  - Incentives
  - Job descriptions
  - Talent pool



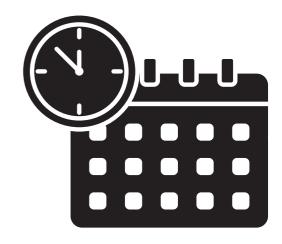




#### **Grow With Joe Business Roadmap**

#### Day 3 - Time Management: 10am - 12pm

- Meeting Review
  - Priority Review
  - Progress on KPI
  - Customer/Client Highlights
  - Issues and Problem Solving
- Time Block
  - Be proactive, not reactive with your schedule
- Yesterday, Today, Tomorrow List
  - Avoid tasks slipping through the cracks
  - Help prepare for the next day



# Day 3 - Business Analytics Management 12:30pm - 2:30pm

- Data Analytics Management
  - Descriptive Analytics
    - What are the trends, missed opportunities from the data
  - Predictive Analytics
    - What are the things that need to be prepared for
  - Prescriptive Analytics
    - How can a situation be optimized using data\
- Create Business Dashboard
  - Quickly visualize opportunities and threats

#### Day 3 - Problem Solving 2:45pm - 5pm

- List Issues
  - What are the issues that prevents the organization from reach their goals
- Discuss Issues
  - What are some top down and bottom approaches that can solve the problems
- Solve the Issues
  - Decide which course of action needs to be acted upon
- Track Progress



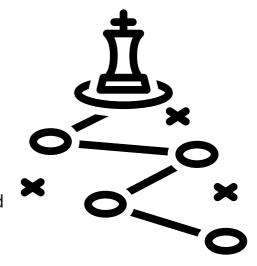
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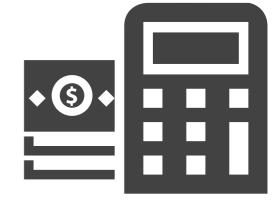
### Day 4 - Data Analytics Strategy: 10am - 12pm

- Review the following questions
  - What's going right?
  - What is not going right?
  - What is a question that needs to be answered?
  - What new data needs to be collected?
  - What are the 3-7 areas that need to focused on?
  - How can action be taken on the results?
  - What systems and processes need to be improved?
  - How can we use this information to increase profits and reduce expenses?



# Day 4 - Financial Management 12:30pm - 2:30pm

- Financial Statement Review
  - Profit and Loss Statement
  - Balance Sheet
  - Income Statement
  - Cash Flow Statement
- Metric Review
  - Highlight Chart for Revenue and Expenses
  - Highlight Chart for Product Sales
  - Highlight Chart for Payroll



# Day 4 - Fraud Management 2:45pm - 5pm

- Access Management
  - Systems and Data
  - Financial
- Cyber Security
  - Training
  - Systems Review
- Liability Protection
  - Employee accountability
  - Fraud Prevention tactics



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