

Cascadia P5™ Roundtables: Building Your Capacity to Grow

Presented by:



CASCADIA
BUSINESS DEVELOPMENT

What does this program do for me?

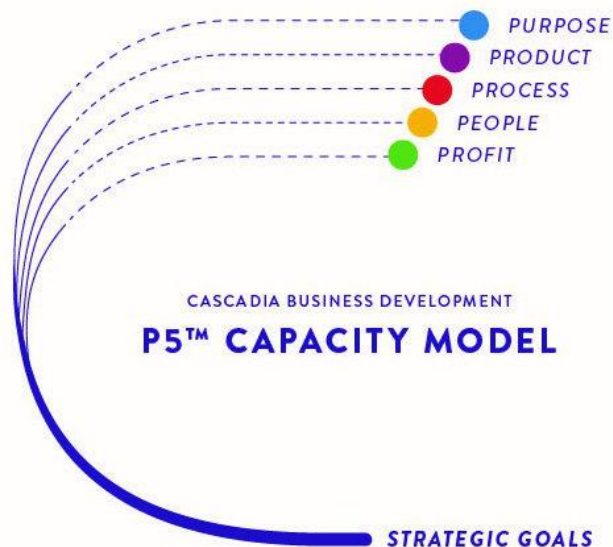
We often hear one of the predominate challenges of becoming a successful business owner or manager is isolation in our daily operations. As a result, Cascadia Business Development joined together with community and educational leaders to create a dynamic program to help build organizational strength. The program was founded on the premise that all businesses have great opportunity when focused on creating ease, flow, and joy in their organization.

- By EASE we mean learning from others, building on existing systems, creating an environment of collaboration, dealing with the “tough stuff” with confidence.
- By FLOW we mean momentum towards a goal, momentum in serving clients and customers, momentum in cash flow, creating repetitive cycles of growth and development by continuously building capacity for the future.
- By JOY we mean helping business owners and their teams focus more on what they want and mapping a path to achieve it. Using “how one feels” as a valid approach to gauge ease, flow and the successful growth of individuals and the organization.

This program is designed to systematically and directly support business leaders (owners, managers, supervisors) as they address common issues impacting organizations at various stages of growth. The program is designed to create an environment of “fast-paced, high-level, focused, supportive, and quality” learning and insight.

Program Framework

The program is based on the P5™ Capacity Model as the primary framework. This model assesses and addresses the 5 most impactful functions within a business: Purpose, Product, Process, People and Profit. This drives the discussion and analysis beyond the basic “what is working, what is not working” assessment. At the end of this intense process, participants will have a deeper understanding of where their businesses may have mis-alignments between functions and strategic goals and where to focus resources for maximum impact.



Training and Development Series

Throughout this program, participants gain in-depth knowledge and understanding of critical business topics. The learning begins with pre-session homework, organizational assessments, and custom video -insights from over 30 professional experts. Over the course of the program, participants will achieve the following learning objectives.



Purpose Management

Organizational Development and Design

- Impacts of entity selection, owner/investor management, business plan development, and succession planning
- Importance of strong cultural development, effective change management, organizational evolution

Organizational Leadership

- Personal authenticity, change management, leadership style selection, importance of trust-based environment, governance and multiculturalism, issues management, leadership ethics, organizational behavior, situational analysis and management

Profit Management

Financial Management

- Understanding financial statements, advantages and disadvantages of budgeting, financial analysis tools/methods, and product budgeting

Profitability Management

- Utilizing tools such as scorecards, KPI matrix, value-based decision making, and cost-volume-profit analysis

Process Management

Lean Operations

- Understanding lean principles and practices of quality system auditing, quality standards, operational and resource alignment, standardization strategies and techniques, waste identification and elimination, developing continuous improvement strategies

People Management

Human Resource Basics

- Exploring various tools and strategies for effective job structuring, recruiting, hiring, and retention
- Understanding Montana State Laws relating to hiring, discrimination, equal opportunity, probation, corrective action, and firing

Performance Management

- Effective methods for establishing records, performance goals, designing and conducting performance reviews, training and development program management, strength-based coaching and mentoring programs



- Managing difficult people and situations including remote employees, technical vs non-technical behavioral types, and personality type management
- Identify tax and healthcare issues associated with employee benefits, compensation modeling

Product/Service Management

Relationship Management

- Impact of customer loyalty on increasing customer base, sales, servicing, profitability, life-time value calculation, and customer retention
- Explore the importance of customer segmentation, needs assessment, rewards programs

Product and Pricing Strategy

- Learn various methods to analyze and improving pricing model, trends in buying behaviors, and developing a competitive pricing strategy
- Explore strategies for selecting meaningful research and development projects, project management, common issues managing R&D projects
- Discuss key elements in managing overall product strategy including market analysis, distribution strategies, product profitability, marketing, and sales readiness and implementation

Sales Management

- Developing sales and marketing strategies, export management, sales compensation, social marketing, internet-based marketing and selling, and value-based selling

Program Features

- Business Capacity Assessment and Personal Strengths Assessment
- Monthly facilitated peer progression groups to drive participants toward building capacity and creating the framework to progress on their business timeline and an outline to support each other in successfully completing the program.
- Monthly workshop series that focuses on specific development areas as identified by the initial business assessment.
- Problem-solving sessions with a peer team.

Roundtable Sequence

- 1) *Pre-Assessment* – every participant will conduct a pre-assessment with their team. The assessment is broken into five areas (Purpose, Process, People, Product, Profit) and designed to identify potential opportunities and/or barriers to growth.



- 2) *Industry Profile* – every participant will receive an industry profile outlining benchmarks, industry challenges, opportunities, management considerations, and key performance indicators.
- 3) *StandOut™ Profile* – each participant will take the StandOut™ assessment as the foundation for personal development and understanding group dynamics.
- 4) *Organization Development Plan* – the framework for each participant to build their organization’s development plan. Each quarter a new one-page plan will be created.
- 5) *Pre-Roundtable Exercises* – each month, pre-session videos/worksheets/assignments/etc. will be distributed to “frame” the upcoming roundtable topic. See topics listed above.
- 6) *Facilitated Roundtables* – monthly “tightly managed” roundtable discussions to stimulate peer problem solving, expansion of knowledge area, ability to see problem from varying perspectives, answering “Where are you?” and “What do you need?” Groups are limited to seven participants to maximize engagement.
- 7) *Monthly Action Initiatives* – using the development plan model, participants will record monthly action initiatives based upon roundtable discussion. These are the starting point for next month’s check-in round.
- 8) *Check-In Speed Round*– accountability and transparency will result from monthly participant check-ins. This is a very fast paced round with opportunity for discussion and additional feedback.

**To register, or find out when the next roundtables begin,
email register@cascadiabusiness.com or call 406.239.3547**

