

# ROI Strategic Business Solutions

*Solutions that improve performance and increase your Return On Investment (ROI)*

## CAR – Management Briefing Seminars – Strategic Planning Outline

**If you are planning to attend the Management Briefing Seminars in 2010, then plan to get more out of your investment!**

| <b>Time line</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <b>30-45 Days</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>5 Days</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <b>30 – 45 Days</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
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| <b>Dates</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | July 1 – August 2, 2010                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | August 2 – 5, 2010                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | August 6 – September 30, 2010                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Goals</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Activities <b>PRIOR TO</b> the MBS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Activities <b>DURING</b> the MBS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Activities <b>AFTER</b> the MBS                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <ol style="list-style-type: none"> <li>1.) Increase visibility / recognition of your company</li> <li>2.) Strategically plan and utilize your resources to meet with key customers and build value added relationships</li> <li>3.) Establish three points of contact with key customers and prospects within the next 30-90 days</li> <li>4.) Leverage networks and relationships to obtain endorsements to meet with decision makers</li> <li>5.) Increase ROI on our investment in the CAR MBS</li> <li>6.) Secure new value based solutions business from customers</li> </ol> | <ol style="list-style-type: none"> <li>1.) Review CAR MBS pre-registration lists from 2009 &amp; 2010</li> <li>2.) Call target customers prior to CAR-MBS to schedule brief meetings</li> <li>3.) Prepare key materials (Business cards, pocket brochures, media announcements, shirts with logo's, etc.)</li> <li>4.) Plan best utilization of time</li> <li>5.) Research clients to meet. <ul style="list-style-type: none"> <li>• Annual announcements</li> <li>• Recent announcements (within the last 6-12 months)</li> </ul> </li> <li>6.) Prepare engagement / elevator speeches, and value statements</li> </ol> | <ol style="list-style-type: none"> <li>1.) When will you arrive?</li> <li>2.) How will your representatives dress?</li> <li>3.) Where will you sit during the sessions to get the most visibility?</li> <li>4.) How will you take advantage of the networking and break sessions?</li> <li>5.) When will you meet with clients? What materials will you need to have to give to them (pocket brochures, etc.)?</li> <li>6.) How will you compile notes and information to prepare follow-up information and for face-to-face meetings?</li> </ol> | <ol style="list-style-type: none"> <li>1.) Prepare and send thank you letters.</li> <li>2.) Prepare and send promised materials.</li> <li>3.) Schedule and make follow-up call to ensure materials were received.</li> <li>4.) Schedule and make follow-up call to schedule face-to-face meeting (or endorsements to appropriate person having P&amp;L responsibility, etc.).</li> <li>5.) Review data and measure effectiveness of this process. Should we use it again next year? What successes did we have? What barriers did we encounter? What improvements could we make?</li> </ol> |

**ROI Strategic Business Solutions**

Warren, Michigan, Ph: (586) 524-1653, Email: rvenet@roisbs.com

**ROI – Sample Value Matrix for contact with potential and current clients**

**From your customers' point of view ....**

| <b>Why Buy</b>                                | <b>Business Issue</b>                                             | <b>Stakeholder</b>                                                        | <b>Desired Outcome</b>                                                    | <b>Feature / Solution</b>                                                                       | <b>Category</b>                                                              | <b>Value Metric</b>               | <b>Value Statement</b>                  | <b>ROI Questions</b>                                   |
|-----------------------------------------------|-------------------------------------------------------------------|---------------------------------------------------------------------------|---------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|-----------------------------------|-----------------------------------------|--------------------------------------------------------|
| Why would your customer want to buy from you? | What is the business issue that you are trying to solve for them? | Who is the stakeholder that would be primarily impacted by your solution? | What is the desired outcome as a result of using your product or service? | What is/are the solutions that you are proposing to resolve the business issue of the customer? | What category does it fit in; Reduce cost?; Increase Revenue?; Avoid costs?. | How will you measure performance? | Example: Reduce the cost of ??? by ???? | What questions will you ask to identify value metrics? |

**For more information contact:**

Rick Venet,  
 President  
 ROI Strategic Business Solutions  
 Ph: (586) 524-1653  
 E mail: rvenet@roisbs.com

***Note:** ROI Strategic Business Solutions is a private company, (not affiliated with CAR) which provides solutions that help clients strategically plan and implement initiatives that improve performance and achieve goals and objectives.*