STORYBOARD

High Impact | Medium Impact | Low Impact

OPERATIONS

Quality Management Systems

- Stock-Outs
- Warranties
- Breakdowns / Maintenance

Production Management Systems

- Lead Time
- Work in Progress
- Queue/Delay
- Productivity
- Cycle Times
- Parts Inventory
- Finished Goods
- Inventory

Cost of Sales

	$	% OF SALES	$	% OF SALES	$	% OF SALES	$	% OF SALES
Sales								
Cost of Sales								
Direct Materials								
Total People								
PP&E								
Other Costs								
Gross Margin								
PP&E Investment								
Yearly Facility								
Working Capital								
Net Assets								
Shop Rate								

Workforce

Absenteeism			
Time to Fill			
Overtime			
Turnover			

Top Suppliers

1.
2.
3.
4.

Supplier Quality

On-Time			
Stock-Outs			

Supplier Diversity

Lean Plant Assessment

Customer satisfaction	
Safety, environment	
Visual management system	
Scheduling system	
Use of space, movement of materials, product flow	
Levels of inventory and work in progress	
Teamwork and motivation	
Condition and maintenance of equipment and tools	
Management of complexity and variation	
Supply chain integration	
Commitment to quality	
TOTAL	

MARKET POSITIONING → INTERNAL PROCESSES

8 Brand Strategy

Necessary Condition 1
Necessary Condition 2

7 Sales & Support Strategy

Necessary Condition 1
Necessary Condition 2

3 Product A Strategy

Necessary Condition 1
Necessary Condition 2

1 Operation Strategy 1

Necessary Condition 1
Necessary Condition 2

4 Product B Strategy

Necessary Condition 1
Necessary Condition 2

2 Operation Strategy 2

Necessary Condition 1
Necessary Condition 2

5 Product C Strategy

Necessary Condition 1
Necessary Condition 2

6 Product D Strategy

Necessary Condition 1
Necessary Condition 2

RESULTS

1
2
3
4
5
6
7
8

OUTCOMES

STRATEGY

OBJECTIVE
INITIATIVE
RESPONSIBILITY

FUTURE VISION

When All Of The Operations , Product, And Marketing Objectives Have Been Achieved, Then The Future Vision Will Have Been Realized

PRODUCTIVITY

Operational Objectives

OBJECTIVE FOR FLOW OR HIGHER UTILIZATION	OBJECTIVE FOR COST OR QUALITY
Desired Outcome	Desired Outcome

REVENUE GROWTH

Product Objectives

OBJECTIVE FOR GROWING CUSTOMER BASE	OBJECTIVE FOR GROWING CUSTOMER SPEND
Desired Outcome	Desired Outcome

Marketing Objectives

OBJECTIVE FOR GROWING CUSTOMER BASE	OBJECTIVE FOR GROWING CUSTOMER SPEND
Desired Outcome	Desired Outcome

	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
STATUS												
NEXT MILESTONE												
ISSUES/RISKS												

STRATEGIC PLAN

PRODUCT A

Description
Top Customers
1.
2.
3.
4.
Sales By Region
Sales By Segment
Market Need
Profitability Analysis
Buyer Persona
Job Title
Key Activities
Buying Criteria
User Persona
Job Title
Key Activities
Needs/Wants/Dislikes

Cost of Sales		Discounts	
Distribution		Retail Price	
Fees		Gross Margin	
Commission		Net Margin	

Key Quality Characteristics

BUYER	USER
BASIC	
PERFORMANCE	
DELIGHTERS	

Competitor Gap Analysis

FEATURE	
1.	
2.	
3.	
4.	
5.	

PRODUCT B

Description
Top Customers
1.
2.
3.
4.
Sales By Region
Sales By Segment
Market Need
Profitability Analysis
Buyer Persona
Job Title
Key Activities
Buying Criteria
User Persona
Job Title
Key Activities
Needs/Wants/Dislikes

Cost of Sales		Discounts	
Distribution		Retail Price	
Fees		Gross Margin	
Commission		Net Margin	

Key Quality Characteristics

BUYER	USER
BASIC	
PERFORMANCE	
DELIGHTERS	

Competitor Gap Analysis

FEATURE	
1.	
2.	
3.	
4.	
5.	

SALES

Sales

Distribution Channels

CHANNEL	VOLUME	AMOUNT	COST ACQUISITION COST	CONVERSION RATE
1.				
2.				
3.				
4.				
5.				
6.				

Win/Loss Analysis

CUSTOMER	REASON

MARKET POSITION

Financials

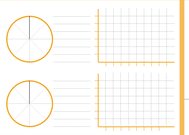
Sales	
Net Profit	
EBITDA	

Employees

Salaried	
Hourly	

Ratios

Quick Ratio	
Net Margin	
Operating Margin	
Sales Per Employee	



Competencies

1.
2.
3.
4.

What We Are

Strengths

Weaknesses

Non-Competencies

1.
2.
3.
4.

What We Are Not

Opportunities

Threats

Unique Advantage

Market Drivers

1.
2.
3.
4.
5.

Brand Vision

Marketing Plan

SUPPORT

Service

Top Service Calls	Top Complaints
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Customer Support Statistics

- First Call Resolution
- Response Time
- Churn
- Service Calls
- Breakdowns
- Maintenance
- Net Promoter

PRODUCT C

Description
Top Customers
1.
2.
3.
4.
Sales By Region
Sales By Segment
Market Need
Profitability Analysis
Buyer Persona
Job Title
Key Activities
Buying Criteria
User Persona
Job Title
Key Activities
Needs/Wants/Dislikes

Cost of Sales		Discounts	
Distribution		Retail Price	
Fees		Gross Margin	
Commission		Net Margin	

Key Quality Characteristics

BUYER	USER
BASIC	
PERFORMANCE	
DELIGHTERS	

Competitor Gap Analysis

FEATURE	
1.	
2.	
3.	
4.	
5.	

PRODUCT D

Description
Top Customers
1.
2.
3.
4.
Sales By Region
Sales By Segment
Market Need
Profitability Analysis
Buyer Persona
Job Title
Key Activities
Buying Criteria
User Persona
Job Title
Key Activities
Needs/Wants/Dislikes

Cost of Sales		Discounts	
Distribution		Retail Price	
Fees		Gross Margin	
Commission		Net Margin	

Key Quality Characteristics

BUYER	USER
BASIC	
PERFORMANCE	
DELIGHTERS	

Competitor Gap Analysis

FEATURE	
1.	
2.	
3.	
4.	
5.	