



**The YPS Group, Inc.  
President’s Model**

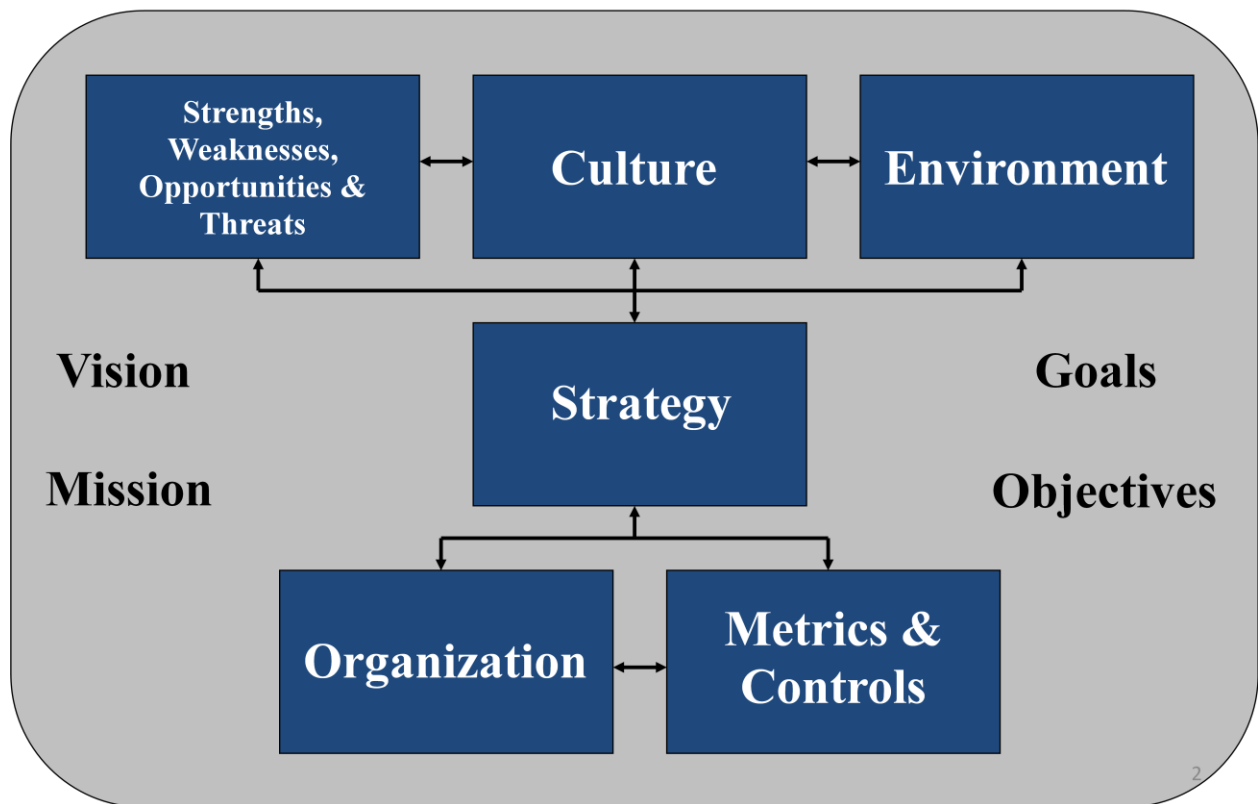
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## Overview

The YPS Group's President's Model is powerful business tool that provides a context for developing, understanding and communicating business plans. It can be used by sales reps to gain a thorough, broad, deep understanding of a customer or prospect. A conscientiously completed "Pres Mod" often enables a rep to have a better understanding of an organization, its objectives, the issues it faces and its plans to address them than many employees and executives working inside of it. That can be a tremendous advantage not only in selling your products and services, but also in serving, supporting and maintaining a long term revenue stream from that client.

# The President's Model



**Vision, Mission, Goals & Objectives:** The first step in completing the model is to write down the overall vision and mission of the organization. A vision tends to be future oriented, while the mission is focused on the present. Three to five broad goals are then formulated. By answering the questions "how much?" and "by when?" these goals by definition become objectives.

**Environment:** This section consists of identifying factors that have a significant influence on the organization, but over which it has little or no control. This includes items such as the state of the overall economy, commodity prices, weather and government regulation.

**Culture:** Every organization has its own unique culture with regard to how it treats personnel, power relationships, controls, performance evaluation and a number of other key factors. A checklist is provided to assess these factors.

**SWOTs:** In this section, the organization's strengths, weaknesses, opportunities and threats are identified. Listing these factors prompts creativity regarding applying strengths to compensate for weaknesses, to exploit opportunities and/or to avoid threats. It can also point toward the need, for example, to develop a strategy to address a major weakness.

**Strategy:** This section describes how the organization intends to achieve objectives given environment, culture and SWOT realities. It will normally consist of several sections. For an enterprise, a strategy will be developed for each major functional area. (i.e., Sales, Finance, IT, etc.) For a specific function, like Sales for example, strategies will be developed for Inside Sales, Outside Sales, Customer Service, etc.

**Organization:** Structure follows strategy. After deciding on strategies, executives must determine who will carry them out and how those groups and/or individuals will relate to one another in an appropriate organizational structure.

**Metrics:** The final step is to identify appropriate measurements for each organizational unit and/or individual. In the case of a Sales function, for example, this would ultimately result in a Sales Compensation Plan.

The true power and value of The President's Model becomes apparent when examining the impact that each of the sections has on each of the others. For example, if improved quality is a goal and quality is a currently weakness, what strategy must I employ to improve? If there is no "Quality Department" within the organization, can I really expect to improve quality? If I don't have specific, quantitative measurements of quality levels, how do I know when or if I achieve my quality objective(s)? If suddenly the marketplace shifts and places great demand on fast delivery, should I continue to fund the quality improvement initiative at the same level?

The questions, linkages and impacts are endless. When used aggressively, the discipline imposed by The President's Model generates a tremendous amount of creative business thinking.

To get started using The President's Model, send an e-mail requesting a "blank" copy to [info@ypsgroup.com](mailto:info@ypsgroup.com). We'll send one to you in MS Word format.

## Vision

❖ ???.

## Mission & Business Overview

❖ Mission Statement:

❖ Business Overview:

## Goals

❖ ???

## Objectives

- ❖ ???

## Environment

- ❖ ???

## Culture

- ❖ Companies vary substantially across a wide range of formal and informal variables that reflect aspects of corporate culture. Some of these aspects can be seen in the way companies perform certain functions, others in prevalent attitudes and modes of behavior and others in some of the operating activities and results of the company.

- ❖ Circle the most appropriate number:

### ➤ Personnel

- Turnover ..... Tenure  
• 1      2      3      4      5
- New hires at all levels ..... New hires at entry level only  
• 1      2      3      4      5
- Money = Security ..... Lifetime employment  
• 1      2      3      4      5
- Discrete Contract ..... Loyalty, Membership  
• 1      2      3      4      5

### ➤ Social responsibility

- Profit Maximization ..... Good Corporate Citizen  
• 1      2      3      4      5

### ➤ Power Relationships

- Strong superiors/weak subordinate ... Collegial  
• 1      2      3      4      5
- Formal Hierarchy ..... Informal  
• 1      2      3      4      5
- Closed Policy Forums ..... Open Policy Forums  
• 1      2      3      4      5
- Vertical Communications ..... Horizontal Communications  
• 1      2      3      4      5

- Individual Authority ..... Group Authority
  - 1      2      3      4      5
- Single Decision-Maker ..... Group Decision Making
  - 1      2      3      4      5
- Survival of the Fittest ..... Parliamentary
  - 1      2      3      4      5
- Manager's Role
  - Financial Manager ..... Entrepreneur
    - 1      2      3      4      5
  - Watch Dog ..... Gardener
    - 1      2      3      4      5
  - Explicit/Discrete Objectives ..... Implicit/Broad Objectives
    - 1      2      3      4      5
- Controls
  - Direct ..... Indirect
    - 1      2      3      4      5
  - Strong ..... Weak
    - 1      2      3      4      5
  - Formal ..... Informal
    - 1      2      3      4      5
- Performance Evaluation
  - Formal/Regular ..... Informal/Periodic
    - 1      2      3      4      5
  - Frequent ..... Infrequent
    - 1      2      3      4      5
  - Quantitative & Objective ..... Qualitative & Subjective
    - 1      2      3      4      5
- Operational Emphasis
  - Efficiency ..... Excellence
    - 1      2      3      4      5
  - Short Term ..... Long Term
    - 1      2      3      4      5
  - Financial ..... Strategic Position
    - 1      2      3      4      5
- Planning

- Tactical ..... Strategic
  - 1      2      3      4      5
  
- Formal/Tight ..... Stretch/Creative
  - 1      2      3      4      5

## **SWOTs**

- ❖ Strengths
  - ???
- ❖ Weaknesses
  - ???
- ❖ Opportunities
  - ???
- ❖ Threats
  - ???

## **Strategy**

### ***Primary Lines of Business***

- ❖ ???

### ***Marketing***

- ❖ Target Markets
  - ???
- ❖ Key Messages
  - ???
- ❖ Programs
  - ???

### ***Sales***

- ❖ ???

### ***Operations***

- ❖ ???

### ***Finance***

- ❖ ???

### ***Human Resources***

- ❖ ???

## Organization

❖ ???

## Measurements

❖ ???