

Meeting Objective

The objective of this meeting is to create a baseline understanding for Ignite XDS of the client organization, its' processes and its' goals.

Meeting Outline:

Current Reality – 30,000 ft View

- **Client: Outline the existing Business Model**
 - » Organization Chart/Structure
 - » Operation Structure
 - » Sales/Marketing Structure
 - » Procurement vs. Sales
 - » Team Culture
 - » Other
- **Briefly Outline Current Business Financial Position**
 - » Revenue/Margin
 - » Clarify and Outline Immediate Reality
- **Outline Current Business Growth Goals**
 - » What are they? How were these goals derived?
 - » Is the company on-track to achieve the goals?
 - What early metrics are there in place to ensure you're on a successful path?
 - Are there any/What processes are in place and cannot be disrupted?
 - » What is working?
 - Is there room to make improvements to positive applications?
 - » What is not working, or could be improved?
 - What improvements are in-process/planned?
- **Outline the current Business Development/ Marketing Strategy**
 - » Define the Projected Result
 - » Define the Probability of Attaining Defined Goals
 - » If any, what areas of the company will/may be strained?
 - » If any, what areas of the company will/may still have available capacity?
- **Review all existing Marketing/Sales Campaign Performance**
- **Are there any historic Marketing/Sales Campaigns of note? (Positive or Negative)**
- **Review Products/Product Line**
 - » Define Categories and Markets
 - » Briefly outline customer profiles (per category/market?)
 - » What is the most profitable category? Why?
 - » What is the least profitable category? Why?

Growth Velocity Exploration

- **Using the current Business Model, and Sales/ Marketing Strategy;**
 - » What would need to happen to add 15%-20% more growth to the current forecast?
 - » Is 15%-20% even doable?
 - If yes, what Percentage would create an impossible stretch goal?
 - » Using the Stretch Growth Percentage; Who/Where would/might the company break?
 - How would the current Customer Experience Change?
 - How would/might Quality of the offering change?
 - How would/might margins be affected?
- **Is the current Business Model Scalable?**
 - » To what point?
 - » Define potential pinch-points
 - » Outline opportunities

Opportunity Review

- **Define the Greatest client opportunity**
 - » What has to happen/change to leverage that opportunity
- **Are there any WILD/THAT COULD NEVER HAPPEN, but if it could ideas for client?**
 - » What's in the way of those ideas?

Conclusion and Thoughts

