

## **BUSINESS ROADMAPPING®**

### **THE BENEFITS AND CHALLENGES OF BUSINESS ROADMAPPING®**

An Interview with

John Bazzone, Author of the “Business Roadmapping Process®”  
President, ATAS Advanced Technology Advisory Services

#### **Q: What is Business Roadmapping®?**

Business Roadmapping® is a management planning tool that provides a snapshot of your business at a point in time against mission critical goals.

It provides a Unified Planning Process that identifies key functional areas, interdependencies, and business processes that focus on execution and achieving short and long term goals.

In summary, Business Roadmapping® clarifies your business goals while providing the discipline and process to manage accelerated growth with a high probability of success.

#### **Q: What are the benefits of Business Roadmapping®?**

It's really a very simple process. But as an example, much like the game of golf, what may appear simple may not always be that easy.

Like golf, in defining your core business we like to keep it simple. The hard part is most often defined as execution.

Depending on the stage a company is in, its value proposition, and perhaps the “Go to Market” strategy all adds complexity. Complexity is unique to every company. However while Business Owners and Senior Executives face unique needs, most challenges they face are common across industries.

The benefit of Business Roadmapping is it provides a consistent Unified Planning Process. Within that process we eliminate the complexities of a business that slow growth and profitability. This causes a business to be more focused and eliminate costly distractions.

#### **Q: So what? All companies plan. Why does Business Roadmapping® do it better?**

Our Unified Planning Process involves the leadership from all key functional areas of your business. It helps everyone to understand interdependencies, prioritize and focus on areas that provide the greatest ROI. We don't ignore areas that do not provide high potential, but as a well run team, everyone understands the plays we are going to run and we provide the discipline to look ahead, plan, execute, report and succeed against a timeline.

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Again, we focus on key areas that have the potential to provide the most growth, profit and business acceleration. Business Roadmapping provides

- A clear picture.
- Disciplined processes; driving goals, communications or feedback and reporting against a timeline.
- Roadmapping removes complexities and in most cases provides an added benefit by strengthening the leadership and governance model of the organization.

That's the power of Business Roadmapping; it forces everyone to stay focused on the key areas that speed growth & profitability. I call it managing growth & profitability with a clear picture or visual.

### **Here is an example;**

The roadmap shows a picture of progress, clear & simple. You are either on target or off.

We don't rely on massive spreadsheets or white papers to interpret and realize weeks later that you are going to miss goals. Again these are also goals with the highest payback.

Most companies simply do not have a management tool with such clarity. Where everyone sees the picture and understands the importance of their goals.

As companies get more mature or complex with management structure or product traditional reporting gets more difficult to manage.

***Lately, this has been called transparency.*** Things happen, no one saw the big picture, so when goals are missed, profits are left on the table and companies fall behind.

### **Q: Why is ATAS important?**

Our people are among the most talented in the industry.

The ATAS team is comprised of experts from Cisco, IBM, AT&T, Nortel, 3Com, Symantec, and other Industry Leaders.

They are also expert in business solutions not just technology. They understand how to monetize solutions.

Why is this important? During a business downturn we help you to not only maximize or grow sales, but to not leave profit on the table. Your solutions will increase your customer spend and deliver more for every dollar, which builds customer loyalty.

ATAS partners are team leaders involved with every engagement.

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We work with Owners and Senior Executives to understand and assess current state of the business. We then leverage the Business Roadmapping© process to provide focus on business acceleration and creating wealth for owners, shareholders and investors.

It is said Strategy is important but Execution is vital to succeed. We do not get distracted. We stay focused on what provides the greatest return for owners and management. We help you stay focused and Execute according to plan.

### **Q: How can ATAS help?**

ATAS is not a "general" consultant.

Your ATAS Team will provide a Roadmap specifically designed to address functional areas that provide the highest impact to your business. We work as part of your management team to insure execution and processes are in place for sustained value.

As an example let me tell you about our Market Share Capture Program©. We address many areas that can help a company accelerate sales, growth & profitability;

- Go to Market* Strategy & Execution
- Marketing and Communications
- Product Positioning & branding
- Sales Training and Management

The challenge in today's market is not simply accelerating sales, but... having the contacts and ability to drive national agreements or position a company to capture major market share.

That is exactly what ATAS does for you.

### **Q: How does the Market Share Capture Program© differ from traditional methods of driving business?**

First, ATAS does not ask you to stop your current sales processes or any of the reporting that goes along with them.

We simply focus on those areas we can improve that will make the biggest difference to your corporate objectives or growth. Our goal is to drive results to the bottom line or as I like to say; build corporate wealth.

Let me provide more detail so you understand what makes the Market Share Capture Program© different than business as usual.

We create with a manufacturer or its resellers specific programs and sales bundles that guarantee revenue attainment by area or major city. The programs are targeted at

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customer business solutions, **not** technology. We assist in the deployment and management of the program, so it is very customer oriented and very effective.

In addition, we roadmap a series of programs so they fit a Go to Market plan by area, region or group of cities. This is very effective because it is well structured to target specific end users and revenue commits by area. The incremental revenue and impact on sales teams and customers will drive business in most areas to new levels. Again it is very effective and **it works!**

### **Q: Give some examples of how companies have used Business Roadmapping®**

First, Business Roadmapping® has been around for years. Its roots are imbedded in the success of some of the brightest & best companies.

It has been used to benchmark key projects for companies in the following industries.

Technology & Distribution  
Banking & Financial Services  
Transportation

Let me give you some examples;

**In the Technology & Distribution sectors** the Market Share Capture Program® is outstanding. It helped a Technology manufacturer increment its sales force by a 15:1 ratio with revenue commitments that allow it to franchise by major city and area.

#### **The benefit to the manufacturer:**

Gross Profit improved from a range of 41-45% GP to 61-65% GP in a very short time, plus it was able to increase sales without adding headcount.

The franchising option by major city drove new business in all major regions with low capital expense requirements.

**NET:** Increased sales force effectiveness at a fraction of the cost

**In Banking & Financial Services** Business Roadmapping is currently being used as a management tool with a Merrill Lynch spinoff to manage new financial service offerings. One of the root causes to the financial meltdown last year was lack of investment diversity and investment managers operating in a silo.

Business Roadmapping is helping to set a new broker model, recruit the best in the industry and build record asset accumulations. It will help this company roadmap the entire process. Most importantly the clients, people like you and I, will have a roadmap for our portfolios that allows investment managers to diversity and not penalize us by

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having to stay in certain investments vs. being in cash while the market drops. The company and its clients both benefit. No more silos, no financial meltdowns.

Finally in the area of **transportation** I have an example of a double win which is usually what Business Roadmapping provides when a manufacturer or reseller uses the process and includes customers as part of the program.

A manufacturer leveraged a competitive win by putting together an 18 month Business Roadmap addressing all transition issues for their customer to purchase a new business solution. The customer would not have left the incumbent vendor had the new manufacturer not jointly planned with the customer using the Unified Planning process.

The result... the customer had the confidence that the manufacturer understood his business. Operational issues, financial concerns and what the customer delivered internally and to his business partners were all part of the solution.

Roadmapping detailed upfront costs, ongoing expenses, and management goals. The roadmap gave both companies the confidence to move forward with the project and complete the project on time and on budget.

**Before we finish I also want to give you an example of how Business Roadmapping pays dividends in the area of executive leadership or governance.** I think you can understand how the unified planning process can be used to keep a senior management team on track.

In this case a new Healthcare CIO had a pressing need to deliver his vision of where he wanted to lead his organization. This executive asked to have the Business Roadmapping process presented to his staff and their managers. As part of the Unified Planning process we brainstormed functional areas of the organization and began to show interdependencies and focus on areas needing improvement.

They now began to see the big picture of how they could reach milestones and not only be recognized but earn performance bonuses.

To make a long story short the CIO used Business Roadmapping to unify his planning process with his management teams. It helped him to paint the picture of his vision and imbed his vision into the business plan.

This addresses one of senior managements biggest challenges... effectively sharing and delivering a vision at the corporate and department level.

Ever read a mission statement and ask yourself; “how do I know if everyone understands?” **How well are we executing at the department or employee level?**

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Business Roadmapping© can provide a single picture or vision of the mission statement and how you stack up. Imagine an executive, manager or sales person talking to a customer about your mission statement and showing a Roadmap of how your company is focused on the customers business. Business Roadmapping© provides focus.

### **Q: This all sounds good but how would a company know if Business Roadmapping is right for them?**

Good question. Business Roadmapping has proven over time that although each business is unique, most challenges they face are common across industries.

We start with a Unified Planning Process; a “*OneTeam* approach” that unifies thinking and the planning process.

This approach allows us to assess with the business owner or senior management the value Business Roadmapping can deliver in real dollars and as I mentioned earlier from a leadership perspective having everyone operate as a team.

Again our focus is on delivering Business Value not selling technology.

In most cases Business Roadmapping requires

- No additional headcount to achieve incremental sales
- Increases sales force effectiveness at a fraction of the cost
- Provides Immediate business opportunities with your existing account base
- Better margins / EBITDA

During the initial assessment a company will know if Business Roadmapping is right for them. Most times it is a self-funding from the incremental revenue and profits driven by our programs like the Market Share Capture Program.

### **Q: OK, final question that I know everyone wants to hear. How does ATAS charge for delivering Business Roadmapping?**

Based on the type of business we are working with we customize to their model.

Businesses like programs that are self-funding. We try to stay away from heavy up front charges. Again we are not general consultants. We work as a part of your team and provide solutions we can deliver with your teams.

There are probably as many ways to compensate as there are customized programs that we create with our customers. The most popular method is based on a percentage of sales.

Most people do not get hung up on compensation as much as they do ways to accelerate sales and cash flow once they understand what can be achieved with this program.

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Example a 3x increase in equipment, services and support sales represent just some of the more traditional areas we can accelerate business. Monthly and annual annuities or fees are some of the more attractive methods we develop to accelerate sales and profits.

Remember, through the process we seek to understand a company almost as well as the owners and senior management. The benefit, we drive efficiencies and maximize the earnings opportunities.

Getting back to our goal... to work with Business Owners and Senior Executives to maximize wealth and valuation of your business.