

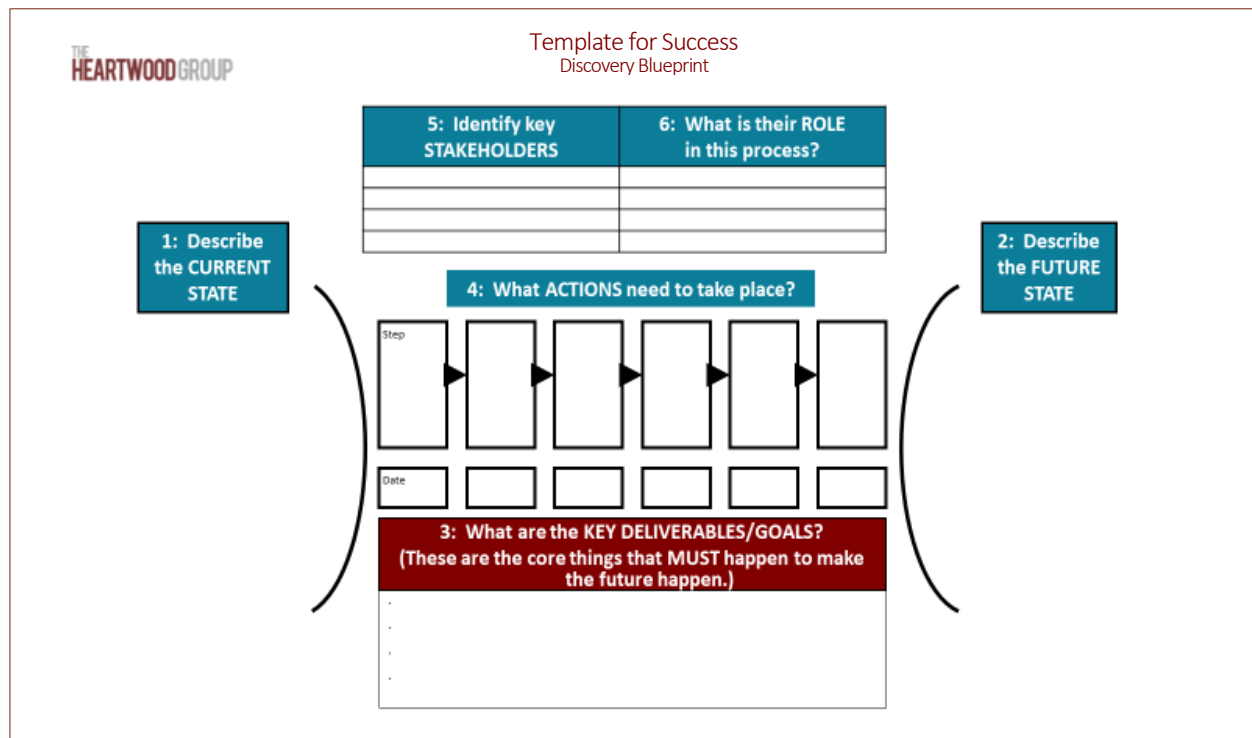
Template for Success Blueprint Process

Purpose & Process

Provides a comprehensive and strategic approach to:

- Honestly assess the current state of a business, issue or opportunity
- Formulate a desired “future state” (goals, vision or outcome)
- Identify actions and deliverables needed to achieve the desired goal/vision/outcome

The process is led by a facilitator and depending upon the subject/scope/group composition can take several hours to a full day to complete. Developing a Template for Success blueprint requires solid teamwork to prioritize, choose and define realistic deliverables. The process serves as a powerful catalyst and driver for growth and transformation.



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|--------------------------|--|
| 1 – Current State | Discover the grounded truths. |
| 2 – Future State | Articulate desired changes. |
| 3 – Deliverables | Identify required deliverables. A deliverable is described as THE essential work/effort/action that must take place or the desired future will not happen. |
| 4 – Actions & Milestones | Identify the main steps needed to create each deliverable and when it needs to be completed. |
| 5 – List Stakeholders | Identify individuals or groups connected to each deliverable. |
| 6 – Stakeholder Roles | Assign roles and responsibilities for each key deliverable. |

Sample Session Flow

Open Session & Intros

- Objectives for the day

Template for Success Concepts

- Thinking strategically together
- What the template is and how it can help with transition

Explore Current State

- Pressing challenges, opportunities
- Business metrics – sales volume, customer trends, etc.
- People trends – at all levels
- Leadership Team assessments of organization
- General items in context of the company

Explore Future State

- Vision
- Business goals
- People and organization
- Knowledge, skills and abilities needed
- Aspirations

Define the Gap

Building the Deliverables List

- Informed by the previous sections
- Test the deliverables against goals

Milestones and Stakeholders

Summary and Next Steps

Follow-Up

- The Heartwood Group compiles detailed summary output documents from the session
- Dependent on scope of work, draft One-Page Plans may be included for core deliverables
- At times clients request our additional support in coaching individuals and teams to deliver against identified opportunities or work further on specific topics

About The Heartwood Group

The Heartwood Group is the result of a calling to help individuals and organizations discover, understand, and strengthen their core purpose. Mark Uhlenberg is owner and founder. Mark's clients value his practical perspective of sales, marketing, and management. As a key leader in corporate headquarters and a business owner, Mark understands the challenges that leaders face and the power of strategic development.