

## <Client> Objectives

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This document is the Ripose - Objectives (goals and measures) deliverable for the <client>.

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Designed with The logo for Ripose, featuring the word "Ripose" in white text on a red rectangular background.

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**Associated documents**

- None

**Caveat**

Due to the time constraints not all areas of the business were explored, hence there will be gaps in the findings. However, these could be completed if more time were available - see Completed steps on page 3

**Outstanding items**

There are sentences in *italics* throughout this document. They are generic statements and may need further refinement if time permits.

## Management summary

This section will contain the summary of findings identified during the initial 2-hour goal ranking sessions.

### Introduction

The result of a strategic business plan is the identification of the core and supporting systems the <Client> needs to effectively run its business and to ultimately achieve its prime objective is to 'look after the needs of its members' (see Purpose on page 4).

To achieve this objective it was necessary to first identify the strengths and weaknesses of the business from each manager's perspective. This enables management to focus on the key issues as quickly as possible. It also assists in the development of key performance indicators.

The key performance indicators in turn help focus on identifying the information requirements, which in turn leads to the discovery of the systems.

As at <date>, in the absence of the appropriate systems, resources, technology and procedures, the general consensus of managers interviewed give the enterprise a x% chance of surviving. The results can be seen in Figure 1 below.

### Strengths & weaknesses

After holding a 1-hour session with 1 manager the following statistics were discovered:

- CSF1 and CSF10 were the major issues
- CSF2, CSF5 and CSF9 were regarded as the next most serious issue
- CSF8 appeared to be the strength of the <Client>

The following graph depicts the ranking of the interviewed manager:

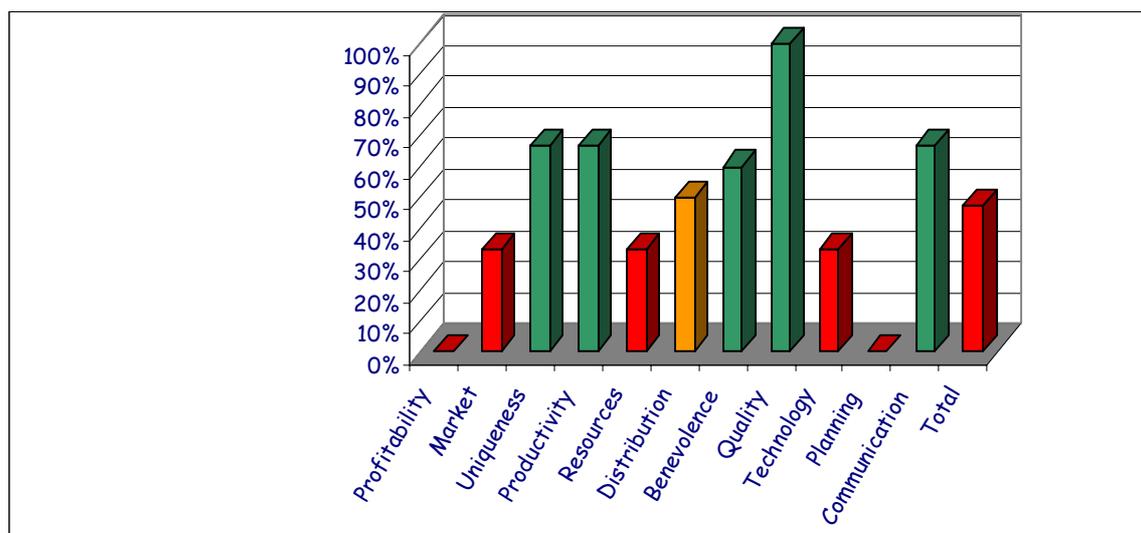


Figure 1 - Ranking

## Management summary

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### Mitigating factors

This section will contain the major reasons for management concerns.

Major comments included:

Critical success factor (CSF)	Reason
<i>CSF1</i>	
<i>CSF2</i>	
<i>CSF3</i>	
<i>CSF4</i>	
<i>CSF5</i>	

### Key issues

This section contains the top level KPIs associated with the weakest CSFs

Issue	Description
<i>KPI1</i>	
<i>KPI2</i>	
<i>KPI3</i>	
<i>KPI4</i>	
<i>KPI5</i>	
<i>KPI6</i>	

### Financial viability

The following table contains indicative first year values for the total funding and budgetary requirements to ensure the sustainability of <Client>.

CSF	Funding	Capital costs	Income	Expenditure	Profit/loss
<b><i>Profitable</i></b>	0	0	0	0	0
<b><i>Productivity</i></b>	0	0	0	0	0
<b><i>Resource</i></b>	0	0	0	0	0
<b><i>Distribution</i></b>	0	0	0	0	0
<b><i>Plan</i></b>	0	0	0	0	0
<b><i>Technology</i></b>	0	0	0	0	0
<b><i>Total</i></b>	0	0	0	0	0

### Executive interviews

#### Proposed interview list

Executive	Title
<the entrepreneur>	Position

### Completed steps

The following steps were completed on the 4 June 2001

1. A verbal agreement was reached between Ripose Pty Limited and the <Client> enabling Ripose to undertake producing the <Client> - Strategic business plan - Objectives.
2. Ripose together with at least one senior <Client> manager produced a tentative assignment plan detailing the dates, participants and duration of the assignment. *As this task was completed over a 2-hour period on the 4 June 2001, this step was not considered necessary.*

### Next steps

In order to deliver the benefits of the Ripose Technique (see the brochure on our web site at <http://www.ripose.com/WhatisRipose.pdf>) - What is Ripose?

The following steps are required:

1. Ripose will produce the <Client> - Strategic business plan - Objectives document, see Deliverable activity steps 1 through 4 on page 14 for more detail on the steps required to produce this document.
2. The <Client> senior management will reach agreement on the findings.
3. A further agreement will be drawn up enabling a <Client> - Proof of concept to be produced with Ripose, see Deliverable activity steps 5 through 12 on page 14 for more detail on the steps required to produce this document.

## Internal objectives

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An internal objective is defined as the way in which a stakeholder views the enterprise from a private nature. These comprise of the following

- Goals
- Key performance indicators

### Goals

Based on the information made available to the Ripose architect, the following strategic planning goals were discovered.

- Purpose
- Benefit/mission and value statements

### Purpose

*<Insert purpose/passion here>*

- Benefit 1
- Benefit 2
- Benefit 3
- Benefit 4

### Benefit/mission and value statements

Prosperity - *<Benefit 1>*

*<Insert benefit description here>*. This is achieved by:

Value	Description	CSF
<i>Value 1</i>	<i>To attain a return on investment expected by management and shareholders.</i>	Profitability
<i>Value 2</i>	<i>To acquire and maintain a specific share of clients.</i>	Market - audience
<i>Value 3</i>	<i>To maintain a strong market position by monitoring both your own organization and competitor's organization.</i> <i>To ensure that your organization has some edge over your competitors.</i>	Unique

## Internal objectives

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### Robustness - <Benefit 2>

<Insert benefit description here>.. This is achieved by:

Value	Description	CSF
Value 4	<i>To ensure that the capacity of the organization is geared to the ability to deliver your services to the market place.</i>	Productivity
Value 5	<i>To maintain the means of supplying all products and services that is needed at all times.</i>	Resource
Value 6	<i>To penetrate or deliver your particular products, services and expertise to the market place.</i>	Distribution

### Esteem - <Benefit 3>

<Insert benefit description here>. This is achieved by:

Value	Description	CSF
Value 7	<i>To raise the profile of the organization by being involved in charitable activities, eg. donations, sponsorships etc.</i>	Benevolence
Value 8	<i>To ensure that the highest possible performing and most efficient products and services reach the marketplace</i>	Quality

## Internal objectives

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Perception - <Benefit 4>

<Insert benefit description here>. This is achieved by:

Value	Description	CSF
<i>Value 9</i>	<i>To enable the spread of information about the organisation's products and services</i>	Communication
<i>Value 10</i>	<i>To establish the methods or procedures by which things are to be done</i> <ul style="list-style-type: none"><li><i>• Pro-active - future events</i></li><li><i>• Re-active - historical events</i></li></ul>	Plan
<i>Value 11</i>	<i>To apply the latest techniques eg. methodologies, computers, communication's equipment etc</i>	Technology

## Internal objectives

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### Key performance indicators

KPIs will assist in the identification of metrics, service level agreements as well as providing a focus for developing the corporate information model/knowledge base.

The following KPIs were discovered during the *n*-hour goal ranking session.

### Profitability

KPIs	Description

### Market

KPIs	Description
•	
•	

### Technology

KPIs	Description
•	

### Resources

KPIs	Description
•	
•	

## Internal objectives

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### Plan

KPIs	Description
Business Plan	A sustainable account of how the business will function
• Financial Plan	Steps required to ensure the profitability of the Organisation
◇ Budget	An annual estimation of costs and income
◇ Cash Flow	An annual estimation of how much money is required on a monthly basis to keep <Client> sustainable
• Risk Analysis	Describes the exposure to possible harm, loss, or injury
• Productivity Plan	The power or capacity to produce a desired result
• Marketing Plan	Steps required to demonstrate how <Client> will gain and grow its client base
◇ Distribution Plan	Steps <Client> will need in order to move its deliverables to its clients
◇ Public Relation Plan	Describes the media needed in order to promote <Client>'s products and services
• Quality Control Plan	Steps <Client> will need in order to ensure its deliverables are in good working order
• Resource Plan	Steps required to ensure that <Client> has sufficient assets to produce and support its deliverables
◇ Technology Plan	Steps <Client> will need in order to ensure they use the most efficient & effective methods and resources in producing and handling their deliverables, clients and resources
• Action Plan	Outlines the sequence in which things are to be done
Strategic Plan	The long range view and procedures <Client> needs in order to Survive
• Objectives	What one intends to do or achieve
◇ Goals	A state one wishes to achieve or to be in
• Proof Of Concept	A model showing how the objectives can be achieved



## External objectives

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An external objective is one, which the major stakeholder wants the public in general, view the enterprise. These are:

- Vision
- Mission
- Actions

### **Vision**

*Insert vision here*

### **Mission**

*Insert mission here*

### **Actions**

- *Insert action here*

## Financial forecasts

This section contains the capex, opex and EBITDA forecasts for the first financial year.

*This section contains an example of what this section will contain.*

<i>CSF</i>	<i>Level 1</i>	<i>Level 2</i>	<i>Capex</i>	<i>Income</i>	<i>Opex</i>	<i>EBITDA</i>
<i>Value 1</i>	<i>KPI 1</i>					<i>0</i>
	<b><i>KPI 1 Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
	<i>KPI 2</i>					<i>0</i>
	<b><i>KPI 2 Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
<i>Value 2</i>	<i>KPI 3</i>	<i>KPI 4</i>				<i>0</i>
		<i>KPI 5</i>				<i>0</i>
	<b><i>KPI 3 Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
	<i>KPI 6</i>					<i>0</i>
	<b><i>KPI 6 Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
	<i>KPI 7</i>					<i>0</i>
	<b><i>KPI 7 Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
<i>Value 3</i>	<i>KPI 8</i>	<i>KPI 9</i>				<i>0</i>
	<b><i>KPI 8 Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
	<i>KPI 10</i>	<i>KPI 11</i>				<i>0</i>
	<b><i>KPI 10 Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
<i>Value 4</i>	<i>Strategic Plan</i>	<i>Distribution Plan</i>				<i>0</i>
		<i>Financial Plan</i>				<i>0</i>
		<i>Marketing Plan</i>				<i>0</i>
		<i>Production Plan</i>				<i>0</i>
		<i>Quality Control Plan</i>				<i>0</i>
		<i>Resource Plan</i>				<i>0</i>
	<i>Technology Plan</i>				<i>0</i>	
<b><i>Strategic Plan Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>	
<i>Value 5</i>	<i>KPI 12</i>	<i>KPI 13</i>				<i>0</i>
	<b><i>KPI 12 Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>
	<b><i>Grand Total</i></b>		<i>0</i>	<i>0</i>	<i>0</i>	<i>0</i>

## Appendices

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### Individual rankings

This section contains the individual ranking, mitigating factors and deviation of the individuals needs and wants from the business. See Rankings.xls spreadsheet for the details.

The deviation is based on the assumption that every individual has 11 (eleven) values they bring to a business. Five (5) of these are classified as what they feel the business needs to satisfy (their heart values) and the six (6) they want the business to satisfy (their head values).

The business should be capable of satisfying 55% of the individual's needs and 45% of their wants. The deviation is the difference between the ideal and what the individual ranks their belief the value they are able to bring to the business.

### Person a

Following the ranking session held on the 31 October 2002, Person a gave the business a x% chance.

Due to the fact that Person a assessed his/her weaknesses lay in his/her wants, he/she gave the business a very good chance of surviving.

### Strengths and weaknesses

Rating	Value	Mitigating factor
Strengths	Benevolence	
	Quality	
Weaknesses	Productivity	<i>Insert reason here</i>
	Technology	<i>Insert reason here</i>

### Deviation from needs and wants

Requirement	Deviation	Values
Needs	x%	Uniqueness; Distribution; Benevolence; Quality; Planning
Wants	y%	Profitability; Market; Productivity; Resources; Technology; Communication

**Person b**

Following the ranking session held on the 31 October 2002, *Person b* gave the business a  $y\%$  chance.

Despite to the fact that *Person b* assessed two (2) of *his/her* weaknesses lay in *his/her* needs and two (2) in *his/her* wants, *he/she* was still able to give the business a very good chance of surviving.

**Strengths and weaknesses**

Rating	Value	Mitigating factor
Strengths	Benevolence	
	Quality	
Weaknesses	Technology	<i>Insert reason here</i>
	Profitability	<i>Insert reason here</i>
	Resources	<i>Insert reason here</i>
	Planning	<i>Insert reason here</i>

**Deviation from needs and wants**

Requirement	Deviation	Values
Needs	X%	Market; Resources; Benevolence; Quality; Planning
Wants	$y\%$	Profitability; Uniqueness; Productivity; Distribution; Technology; Communication

### **Deliverable activity steps**

#### *Strategic business plan - Objectives document*

1. All senior managers attend a half-day Goal setting seminar to align their views. Ripose will provide a grade 1 architect to facilitate.
2. All managers participate in an individual 1-hour goal ranking session. Ripose will provide a grade 1 architect to facilitate.
3. A Ripose grade 1 architect will prepare a document similar to this document as well as a presentation for senior management to discuss the findings.
4. The <Client> senior managers will need to attend a half-hour presentation on the findings.

#### *Strategic business plan - Business strategies document (proof of concept)*

5. Ripose together with a senior a <Client> manager will produce an assignment plan detailing the dates, participants and duration of producing the <Client> - Business strategies.
6. Ripose together with a senior <Client> manager will produce an interview list detailing the dates, participants and duration of steps 7 through 11 (with the optional step 12 if required).
7. Senior and operational managers will need to participate in a 1-hour information modelling session to assist with the building of the corporate information model utilizing the key performance indicators. Ripose will provide a grade 2 - Architect to facilitate.
8. Ripose will provide a grade 3 - Architect to identify the business activities/functions utilizing the information model.
9. Ripose will provide a grade 3 - Architect to identify the prioritised systems utilizing the business functions and the information model.
10. Ripose will provide a grade 3 - Architect to finalise the proof of concept deliverable.
11. The senior managers of <Client> will need to attend a 2-hour presentation to discuss the findings of the proof of concept.

#### *Strategic business plan - Business statements*

12. As an optional step, Ripose can provide a grade 1 - Architect to produce the business statement document. This may require further 1-hour sessions with each of the <Client>'s senior managers.

#### *Business plan*

13. Ripose will write the draft <Client> Business plan.

**Agreement summary**

Clause	Summary
Parties	<ul style="list-style-type: none"><li>- Ripose Pty Limited</li><li>- &lt;Client&gt; Limited</li></ul>
Term	<ul style="list-style-type: none"><li>- Start - 4 June 2001</li><li>- Finish - 11 June 2001</li></ul>
Services	<ul style="list-style-type: none"><li>- Ripose agrees to provide Charles Richter as consultant to &lt;Client&gt; to produce the deliverables (see deliverables below)</li></ul>
Fees	<ul style="list-style-type: none"><li>- Fixed price of \$0.00 (includes GST)</li></ul>
Payment schedule	<ul style="list-style-type: none"><li>- Initial payment of \$0.00</li><li>- Final payment of \$0.00 - on deliverable delivery</li></ul>
Payment terms	<ul style="list-style-type: none"><li>- Nett 7 days</li></ul>
Deliverables	<ul style="list-style-type: none"><li>- The &lt;Client&gt; Strategic business plan - Objectives document which will comprise the following:<ul style="list-style-type: none"><li>o An executive summary</li><li>o The &lt;Client&gt; 1-4-11 statements</li><li>o The &lt;Client&gt; key performance indicators (approximately 8 KPIs per manager)</li><li>o Financial forecasts</li></ul></li><li>- A formal presentation outlining the findings</li></ul>

### Glossary of terms

This section contains the definition of terms used in this document.

Term	Description
1-4-11	The Ripose Techniques anatomy of goals <ul style="list-style-type: none"> <li>• 1 purpose/passion</li> <li>• 4 mission/benefit statements</li> <li>• 11 critical success factors/values</li> </ul>
Benefit	The major gains an organisation stands to make by achieving their main goal - purpose. Also known as the organisation's missions (see Mission)
Benevolence	To raise the profile of the organization by being involved in charitable activities, eg. donations, sponsorships etc.
Capex	Capital expenditure. Can be subject to depreciation
CASPAR	The Ripose computer assisted strategic planning and reasoning engine
Communication	To enable the spread of information about the organization's products and services.
Critical success factor	A critical success factor (CSF) is any crucial expression, which if adhered to, will lead to a favorable outcome - see Values
Distribution	To penetrate or deliver your particular products, services and expertise to the market place.
EBITDA	Earnings before income tax depreciation & amortisation
Esteem	To be held in respect; to be judged highly.
Goal	A goal is any state a person wishes to achieve or a person has achieved. In the Ripose technique, goals represent the internal (rather than the external) view of the organization.
Key performance indicator	A KPI is any important pointer, gauge, measure or component, which assists in the fulfillment of a task.
Market - audience	To acquire and maintain a specific share of clients.

## Appendices

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Term	Description
Mission	<p>Aim set out in order to achieve the prime goal (purpose) - see Benefit.</p> <p>Generically all organizations can be viewed as having the following 4 sub goals or missions:</p> <ul style="list-style-type: none"><li>• Prosperity</li><li>• Robustness</li><li>• Esteem</li><li>• Perception</li></ul>
Opex	Operating expenditure.
Passion	The desire, ardor and enthusiasm of the organisation's personnel to survive - see purpose
Perception	To understand fully; to have knowledge.
Plan	<p>To establish the methods or procedures by which things are to be done:</p> <ul style="list-style-type: none"><li>• Pro-actively - future events</li><li>• Re-actively - historical events</li></ul>
Productivity	To ensure that the capacity of the organization is geared to the ability to deliver your services to the market place.
Profitability	To attain a return on investment expected by management and shareholders.
Prosperity	To thrive and flourish.
Purpose	The prime goal - To survive - see passion
Quality	To ensure that the highest possible performing and most efficient products and services reach the marketplace.
Resource	To maintain the means of supplying all products and services that is needed at all times.
Robust	To be in good health; to be sturdy.
Technology	To apply the latest techniques, eg. methodologies, computers, communication's equipment etc.

## Appendices

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Term	Description
Unique	To maintain a strong market position by monitoring both your own organization and competitor's organization.  To ensure that your organization has some edge over your competitors.
Values	The merit the organisation will achieve through its benefits. Also known as critical success factors

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