**Week 1**

Meetings will be conducted across the employee ranks to create a detailed understanding of the business model, technology offerings, the team and begin to form a quantitative analysis of the opportunities and risks.

**Introductions and Assurances**

* Meet with the executive team as a group and briefly as individuals to answer any fast questions, provide assurance to the team, and request detail information for their particular function for later in the week.
* Meet the employees as a group to introduce and provide assurances and begin to meet with key employees to get insight into the operational company, not just the management team, answer questions, and provide assurance.

**Marketing and Sales**

* VP/Sales and VP/Biz Dev provide marketing information, plan, and supporting information
* Detail customer funnel and definitions of stages
* Detail use cases and customer value propositions
* Competitive analysis and differentiation
* Customer product requests and the process used to validate, prioritize, and current status of requests and features

**Product Offering and Roadmap**

* Detailed description of the defined product – what is included, what is coming on planned releases, and what has been rejected or excluded from the product
* Description of value attributed to portions of the technology
* Installation and maintenance requirements
* Approximate schedules for products in the roadmap

**Technology / Development Status Walkthrough**

* Hardware or system design content
* Software design content
* Development process – how is it defined, developed, validated, and documented
* Performance / Architectural modeling methodology
* Detailed review of current status against upcoming releases, risk areas, and mitigation plans
* Stress testing procedures and resources – is there enough time and systems available to test product internally or is there too much reliance on customers

**Day 5 – Goal: Staffing, Finance, and Budget**

* Current organization and adjustments in the plan
* Review of finance operations and planning process
* Review of the budget and forecast

**Week 2**

An initial assessment of the risks and problem areas will be validated with the team and reviewed with the board. These will include proposed plans to reduce risks and compensate for the deficiencies – typically it can include adjusting responsibilities, clearly specifying and assigning actions to be performed, resolving deferred issues, and correcting staffing issues. Changes would be planned in a way to improve, not negatively impact, upcoming release schedule and quality.

It is also vital that regular status and communication is established between the different leaders and provide an opportunity to alert each other and resolve any challenges that need to be addressed. This needs to be started by the second week, but any existing structure / methods need to be observed the first week to determine if any change is warranted.

**Day 6 & 7 – Goal: Communicate next steps**

* Based on the meetings and information gathered the previous week, some conclusions will be accessible – these would be shared with the board, executive team, and applicable staff
* Most of the next steps will have ownership and actions required by the staff with the immediate access and background so progress should be timely
* The team will drive the required changes to the company and operational plan. To enable this, the existing team (with modification if required) will expand and implement the clarification and direction of the key issues or decisions.

**Day 8 & 9 – Goal: Review and changes or adjustments with owners**

Meet with individuals and ensure that required actions / adjustments are understood

**Day 10 – Goal: Communicate progress to the team**

* Meet with employees and provide information on what is being done, why it was necessary, what the goal and expectations are, and answer questions
* Depending on the scenario this would be the time to inform that the company is looking to add certain missing skills, is making changes in leadership if required, and any changes or expected changes in products or market focus.

**Week 3-8**

During this period, the direction (change) will be set in motion. The most important factors are visible progress, focus and coordinated activity by the team, and continued open communication.

This includes a new strategic plan that is detailed enough to guide actions and measure results against. Work and tasks assigned and everyone working toward establishing the details require to achieve the company’s mission.

**Week 9-12**

Success with the completion of relevant changes or redirection, renewed customer traction, and team operation will have been demonstrated during this time. There are often some discoveries that require slight adjustments / revisions to the strategic operational plan, but working with the executive leadership to process these and help them establish a culture of pragmatic data-driven decision making and execution.