

顾问咨询指南 Consulting

CPDR

全国职业经理MBA双证班

认证系列：职业经理、人力资源总监、营销经理、品质经理、生产经理、物流经理、项目经理、企业培训师、酒店经理、市场总监、财务总监、行政总监、采购经理、营销策划师、企业管理咨询师、企业总经理等高级资格认证。

颁发双证：高级经理资格证书+MBA 高等教育研修结业证书（含2年全套学籍档案）

证书说明：证书全国通用、电子注册，是提干、求职、晋级、移民的有效依据

学习期限：3个月（允许工作经验丰富学员提前毕业） **收费标准：**全部学费 **1280** 元

咨询电话：13684609885 0451- 88342620 **招生网站：**<http://www.mhjy.net>

电子邮箱：xchy007@163.com **颁证单位：**中国经济管理大学 **承办单位：**美华管理人才学校

全国招生 函授教育 颁发双证 权威有效



职业经理 MBA 整套实战教程

千本好书 **免费** 下载 学校网址：www.mhjy.net

全国Mini-MBA职业经理双证班



精品课程 权威双证 全国招生 请速充电

你可能准备跳槽或者求职, 却为缺少行业经验和专业证书而被用人单位百般挑惕!

你可能目前衣食无忧, 但随着年龄的增长和社会竞争压力的增大, 因为得不到专业的全新培训而失去竞争的机会和面临被淘汰的危机。

美华教育携手中国经济管理大学面向全国举办迷你 MBA 职业经理双证书班, 毕业颁发双证书。

招生专业及其颁发证书

认证项目	颁发双证	学费
全国《职业经理》MBA 高等教育双证书班	高级职业经理资格证书+2 年制 MBA 高等教育研修结业证书	1280 元
全国《人力资源总监》MBA 双证书班	高级人力资源总监职业经理资格证书+2 年制 MBA 高等教育研修证书	1280 元
全国《生产经理》MBA 高等教育双证班	高级生产管理职业经理资格证书+2 年制 MBA 高等教育研修结业证书	1280 元
全国《品质经理》MBA 高等教育双证班	高级品质管理职业经理资格证书+2 年制 MBA 高等教育研修结业证书	1280 元
全国《营销经理》MBA 高等教育双证班	高级营销经理资格证书+2 年制 MBA 高等教育研修结业证书	1280 元
全国《物流经理》MBA 高等教育双证班	高级物流管理职业经理资格证书+2 年制 MBA 高等教育结业证书	1280 元
全国《项目经理》MBA 高等教育双证班	高级项目管理职业经理资格证书+2 年制 MBA 高等教育研修结业证书	1280 元
全国《市场总监》MBA 高等教育双证书班	高级市场总监职业经理资格证书+2 年制 MBA 高等教育研修结业证书	1280 元
全国《酒店经理》MBA 高等教育双证班	高级酒店管理职业经理资格证书+2 年制 MBA 高等教育研修结业证书	1280 元
全国《企业培训师》MBA 高等教育双证班	企业培训师高级资格认证毕业证书+2 年制 MBA 高等教育研修证书	1280 元
全国《财务总监》MBA 高等教育双证班	高级财务总监职业经理资格证书+2 年制 MBA 高等教育研修结业证书	1280 元
全国《营销策划师》MBA 双证书班	高级营销策划师高级资格认证证书+2 年制 MBA 高等教育研修证书	1280 元
全国《企业总经理》MBA 高等教育双证班	全国企业总经理高级资格证书+2 年制 MBA 高等教育研修结业证书	1280 元
全国《行政总监》MBA 高等教育双证班	高级行政总监职业经理资格证书+2 年制 MBA 高等教育结业证书	1280 元
全国《采购经理》MBA 高等教育双证班	高级采购管理职业经理资格证书+2 年制 MBA 高等教育结业证书	1280 元
全国《医院管理》MBA 高等教育双证班	高级医院管理职业经理资格证书+2 年制 MBA 高等教育结业证书	1280 元
全国《企业管理咨询师》MBA 双证班	高级企业管理咨询师资格证书+2 年制 MBA 高等教育结业证书	1280 元



【授课方式】 全国招生、函授学习、权威双证

我校采用国际通用3结合的先进教育方式授课（远程函授+教学电子光盘自修+网络学院持续视频学习）



【颁发证书】 学员毕业后可以获取权威双证书与全套学员学籍档案

- 1、毕业后可以获取相应专业钢印《高级职业经理资格证书》;
- 2、毕业后可以获取2年制的《MBA研究生课程高等教育研修结业证书》;



【证书说明】

1. 证书加盖中国经济管理大学钢印和公章（学校官方网站电子注册查询、随证书带整套学籍档案）;
2. 毕业获取的证书与面授学员完全一致，无“函授”字样，与面授学员享有同等待遇，证书是学员求职、提干、晋级的有效证明；。



【学习期限】 3个月（允许有工作经验学员提前毕业，毕业获取证书后学校仍持续辅导2年）



【收费标准】 全部费用1280元（含教材光盘、认证辅导、注册证书、学籍注册等全部费用）

函授学习为你节省了大量的宝贵的学习时间以及昂贵的MBA导师的面授费用，是经理人首选的学习方式。



【招生对象】

- 1、对管理知识感兴趣，具有简单电脑操作能力（有2年以上相应工作经验者可以申请提前毕业）。
- 2、年龄在20—55岁之间的各界管理知识需求者均可报名学习。



【教程特点】

- 1、完全实战教材，注重企业实战管理方法与中国管理背景完美融合，关注学员实际执行能力的培养；
- 2、对学员采用1对1顾问式教学指导，确保学员顺利完成学业、胸有成竹的走向领导岗位；
- 3、互动学习（专家、顾问24小时接受在线咨询，第一时间回答学员的提问和咨询）



【考试说明】

1. 卷面考核：毕业试卷是一套完整的情景模拟试卷（与工作相关联的基础问卷）
2. 论文考核：毕业需要提交2000字的论文（学员不需要参加毕业论文答辩但论文中必修体现出5点独特的企业管理心得）
3. 综合心理测评等问卷。



【颁证单位】

中国经济管理大学经中华人民共和国香港特别行政区批准注册成立。目前中国经济管理大学课程涉及国际学位教育、国际职业教育等。学院教学方式灵活多样，注重人才的实际技能的培养，向学员传授先进的管理思想和实际工作技能，学院会永远遵循“科技兴国、严谨办学”的原则不断的向社会提供优秀的管理人才。



【承办单位】

美华管理人才学校是中国最早由教委批准成立的“工商管理MBA实战教育机构”之一，由资深MBA教育专家、教育协会常务理事徐传有教授担任学校理事长。迄今为止，已为社会培养各类“能力型”管理人才近10万余人，并为多家企业提供了整合策划和企业内训，连续13年被教委评选为《优秀成人教育学校》《甲级先进办学单位》。办学多年来，美华人独特的教学方法，先进的教学理念赢得了社会各界的高度赞誉和认可。



【咨询电话】13684609885 0451--88342620

【咨询教师】王海涛 郑毅

【学校网站】<http://www.mhjy.net>

【咨询邮箱】xchy007@163.com



【报名须知】

- 1、报名登记表格下载后详细填写并发送邮件至 xchy007@163.com (入学时不需要提交相片，毕业提交试卷同时邮寄4张2寸相片和一张身份证复印件即可)
- 2、交费后请及时电话通知招生办确认，以便于收费当日学校为你办理教材邮寄等入学手续。



【证书样本】(全国招生 函授学习 权威双证 请速充电)

(高级职业经理资格证书样本)

(两年制研究生课程高等教育结业证书样本)



【学费缴纳方式】可以选择以下任意一种方式缴纳学费

方式一	学校地址	邮寄地址：哈尔滨市道外区南马路 120 号职工大学 109 室 邮政编码：150020 收件人：王海涛
方式二	学校帐号	学校帐号：184080723702015 账号户名：哈尔滨市道外区美华管理人才学校 开户银行：哈尔滨银行龙江支行 支付系统行号：313261018018
方式三	交通银行 (太平洋卡)	帐号：40551220360141505 户名：王海涛 开户行：交通银行哈尔滨分行信用卡中心
方式四	邮政储蓄 (存折)	帐号：602610301201201234 户名：王海涛 开户行：哈尔滨道外储蓄中心
方式五	中国工商银行 (存折)	帐号：3500016701101298023 户名：王海涛 开户行：哈尔滨市道外区靖宇支行
方式六	建设银行帐户 (存折)	中国人民建设银行帐户 (存折)： 1141449980130106399 用户名：王海涛
方式七	农业银行帐户 (卡号)	农业银行帐户 (卡号)： 6228480170232416918 用户名：王海涛 农行卡开户银行：中国农业银行黑龙江分行营业部道外支行景阳支行

可以选择任意一种方式缴纳学费，建议使用第五种方式（中国工商银行，比较方便快捷）收到学费的当天，学校就会用邮政特快的方式为你邮寄教材和考试问卷。

<http://www.mhgy.net>

目录

TABLE OF CONTENTS

背景 BACKGROUND.....	4
了解本指南 UNDERSTANDING THIS GUIDE.....	6
八模块企业发展阶梯 THE 8 MODULE BUSINESS DEVELOPMENT LADDER	9
模块一：了解你的企业 MODULE 1: UNDERSTANDING WHAT BUSINESS YOU ARE IN	10
概述 OVERVIEW	10
主要学习目标 KEY LEARNING OBJECTIVES	11
工具 TOOLS.....	12
典型的模块一程序 TYPICAL MODULE 1 PROGRAM.....	13
需完成的任务 TASKS TO BE COMPLETED.....	14
模块二：了解顾客、市场和产品 MODULE 2: UNDERSTANDING THE CUSTOMERS, MARKETS AND PRODUCTS	29
概述 OVERVIEW	29
主要学习目标 KEY LEARNING OBJECTIVES	30
工具 TOOLS.....	31
典型模块二程序 TYPICAL MODULE 2 PROGRAM.....	33
需完成的任务 TASKS TO BE COMPLETED.....	34
模块三：确定商业模式 MODULE 3: DEFINING THE BUSINESS MODEL	50
概述 OVERVIEW.....	50
主要学习目标 KEY LEARNING OBJECTIVES	51
工具 TOOLS.....	52
典型的模块三程序 TYPICAL MODULE 3 PROGRAM.....	54
需完成的任务 TASKS TO BE COMPLETED.....	54
需完成的任务 TASKS TO BE COMPLETED.....	55
模块四：员工授权 MODULE 4: TEAM EMPOWERMENT	71
对企业业绩进行管理 MANAGING ORGANISATIONAL PERFORMANCE.....	72
主要学习目标 KEY LEARNING OBJECTIVES	73
工具 TOOLS.....	74
需完成的任务 TASKS TO BE COMPLETED.....	77
模块五：市场营销战略计划 MODULE 5: STRATEGIC MARKETING PLAN.....	93
概述 OVERVIEW	93
主要学习目标 KEY LEARNING OBJECTIVES	94
工具 TOOLS.....	95
典型的模块五程序 TYPICAL MODULE 5 PROGRAM.....	97
需完成的任务 TASKS TO BE COMPLETED.....	98
模块六：企业系统化 MODULE 6: BUSINESS INDEPENDENCE	114
概述 OVERVIEW	114
主要学习目标 KEY LEARNING OBJECTIVES	116
工具 TOOLS.....	117
典型的模块六程序 TYPICAL MODULE 6 PROGRAM.....	119

需完成任务 TASKS TO BE COMPLETED.....	120
模块七:组织结构, 知识, 环境管理和技术应用战略 MODULE 7: ORGANISATIONAL STRUCTURE, KNOWLEDGE, ENVIRONMENTAL MANAGEMENT AND TECHNOLOGY STRATEGIES.....	136
概述 OVERVIEW.....	136
主要学习目标 KEY LEARNING OBJECTIVES.....	138
工具 TOOLS.....	139
典型的模块七程序 TYPICAL MODULE 7 PROGRAM.....	141
需完成任务 TASKS TO BE COMPLETED.....	142
模块八:反馈和持续改善 MODULE 8: FEEDBACK AND CONTINUOUS IMPROVEMENT....	158
概述 OVERVIEW.....	158
学习目标 LEARNING OBJECTIVES.....	159
工具 TOOLS.....	160
典型的模块八程序 TYPICAL MODULE 8 PROGRAM.....	162
需完成任务 TASKS TO BE COMPLETED.....	162
需完成任务 TASKS TO BE COMPLETED.....	163
注 NOTES	179
注 NOTES	180
注 NOTES	181
注 NOTES	182



职业经理 MBA 整套实战教程

千本好书 **免费** 下载 学校网址: www.mhjy.net

背景

Background

本指南旨在为咨询顾问公司和其它商业服务机构提供技术和方法，使他们能够成功地为中小企业提供咨询服务。

This guide is designed to provide consultants and other service providers with techniques and methodologies that will enable them to embark on successful consulting engagements with small/medium size enterprises (SMEs).

这里提供的资料旨在帮助咨询顾问公司能够与中小企业建立互惠的关系。 这些方法不仅可以获得“快速取胜”的效果，还能够促进咨询顾问与客户之间建立长期的关系----这是一种让咨询顾问获得“受信任的顾问”的地位的关系，是一种使双方的知识和资源汇集成一个“知识和资源库”的关系。

The materials provided, aim to enable the consultant to engage with SMEs in a mutually beneficial relationship. While the methodologies used will provide “quick wins,” the materials are designed to facilitate a long-term relationship between consultant and client – a relationship where the consultant earns the status of “trusted advisor” and where the knowledge and resources of both parties are used to create a “pool of knowledge and resources.”

该项目的目的是改善企业在财务和运营这两方面的**业绩**。这是通过在企业中实施许许多多小的措施后达到的结果。普通和**优秀**企业的区别总是体现在这些小事之中！

The purpose of the program is to improve the **performance** of the business – both financially and operationally. This will be achieved as a result of the many, many little things that you implement in your business. The difference between ordinary and **extra-ordinary** business always lies in these little things!

本项目分为八个模块

The program is split into 8 Modules;

1. 了解你的企业
Understanding What Business You Are In;
2. 了解你的客户，产品和市场
Understanding Your Customers, Products and Markets;

3. 商业模式
The Business Model;
4. 员工授权
Team Empowerment;
5. 市场营销战略规划
The Strategic Marketing Plan;
6. 企业系统化
Business Independence;
7. 组织结构，知识， 环境管理和技术应用战略
Organizational Structure， Knowledge， Environment Management and Technology Strategies; and
8. 反馈与持续改善
Feedback and Continuous Improvement.

我们建议你在按月收取客户咨询费的前提上， 全面实施本项目。 但是， 在某些情况下， 先提供本项目的部分内容可能更合适， 例如，“客户咨询会”， 或“优质服务—争创第一”的客户服务培训。

We recommend that you implement the program in its entirety based on the client paying a fixed monthly fee for your services. However in some instances it may be more appropriate to offer just a few aspects of the program, for example, the Customer Advisory Session or the “Exceptional Service – Leading The Pack” customer service training.

本项目旨在了解企业， 提出和实施改进措施， 提供对企业所有者和员工都有实际意义的培训。 本项目旨在使企业业绩得到长期， 显著的改善。

The program is based on exploring the business, generating and implementing improvements and providing practical meaningful training to both the business owners and the team members. It is based on achieving significant long-term business performance improvements.

了解本指南

Understanding This Guide

本指南旨在概述经营业绩改善项目的八个模块。

This guide aims to provide an overview of the 8 Module Business Performance Improvement Program.







经营业绩改善项目共分为八个模块：

The Business Performance Improvement Program has been split into 8 distinct Modules:

1. 了解你的企业
Understanding What Business You Are In;
2. 了解你的客户，产品和市场
Understanding Your Customers, Products and Markets;
3. 商业模式
The Business Model;
4. 员工授权
Team Empowerment;
5. 市场营销战略计划
The Strategic Marketing Plan;
6. 企业系统化
Business Independence;
7. 组织结构，知识，环境管理和技术应用战略
Organisational Structure, Knowledge, Environment Management and Technology Strategies; and
8. 反馈与持续改善
Feedback and Continuous Improvement

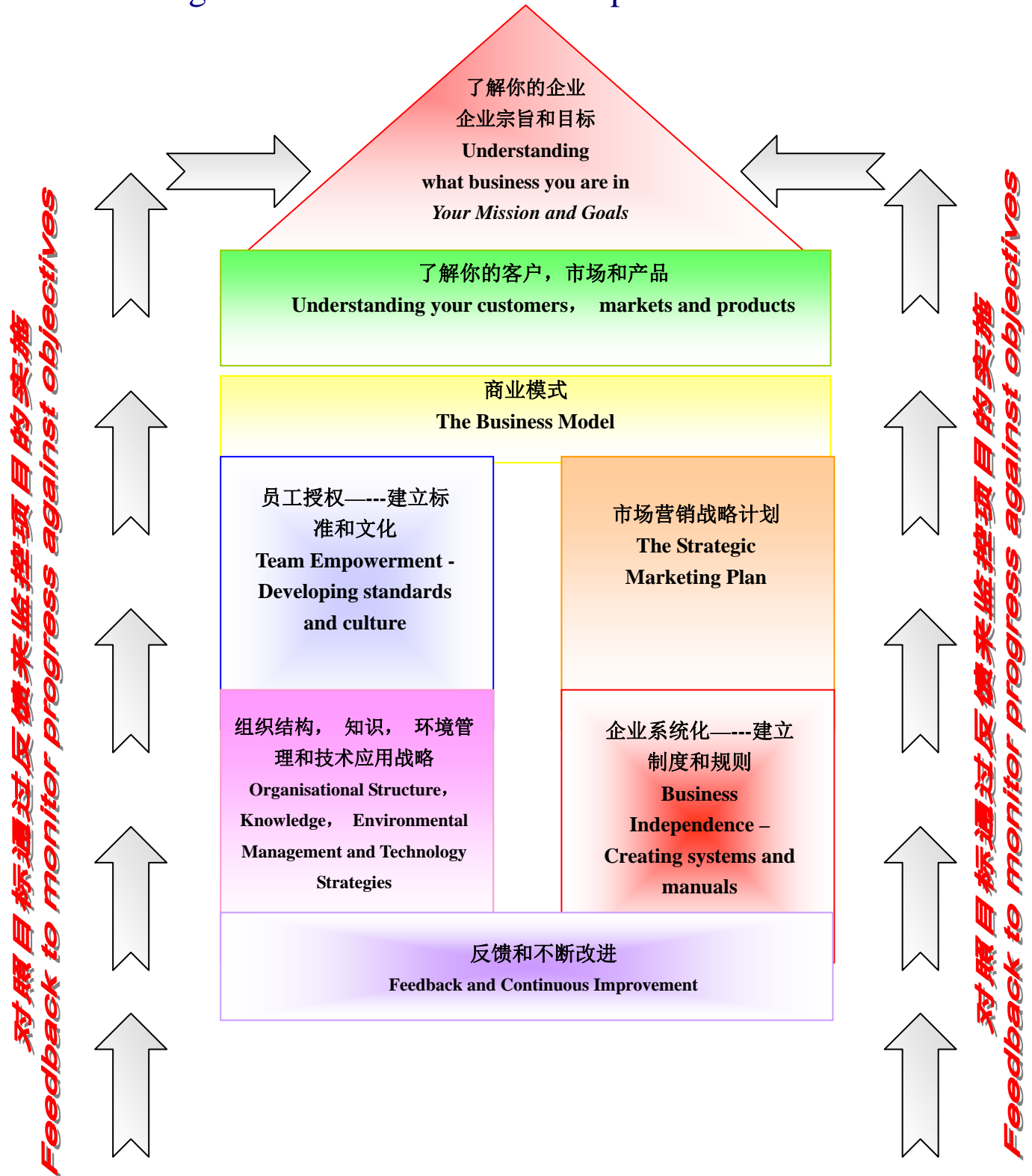
本指南接下来的部分对每个模块进行了概述。每个模块都由 8 个步骤组成。本指南中还提供有图表，以帮助咨询顾问学习和理解这一流程。此外，有工具提供的步骤也标注有专门的符号。针对每个模块，我们都已提供了以下内容：

The following sections of this guide will provide an overview of each of these Modules. Each Module is broken down into an eight stage process. Where possible, throughout the guide, diagrams have been used to facilitate the learning and understanding process. In addition, symbols have been used to identify the tools used in each stage of the process. For each Module of the process, we have provided:

- 该模块的概述
An overview of the Module;
- 主要学习目标(以  表示)
Key Learning Objectives (denoted by );
- 该模块中提供的工具(以  表示)
A list of the available tools for that Module (denoted by );
- 以图示方法列出八个步骤
A diagrammatic representation of the 8 stages involved; and
- “需完成的工作” 清单， 与工具相互参照 (以  表示)
A list of “Things to Do, ” cross-referenced to the tools (denoted by )

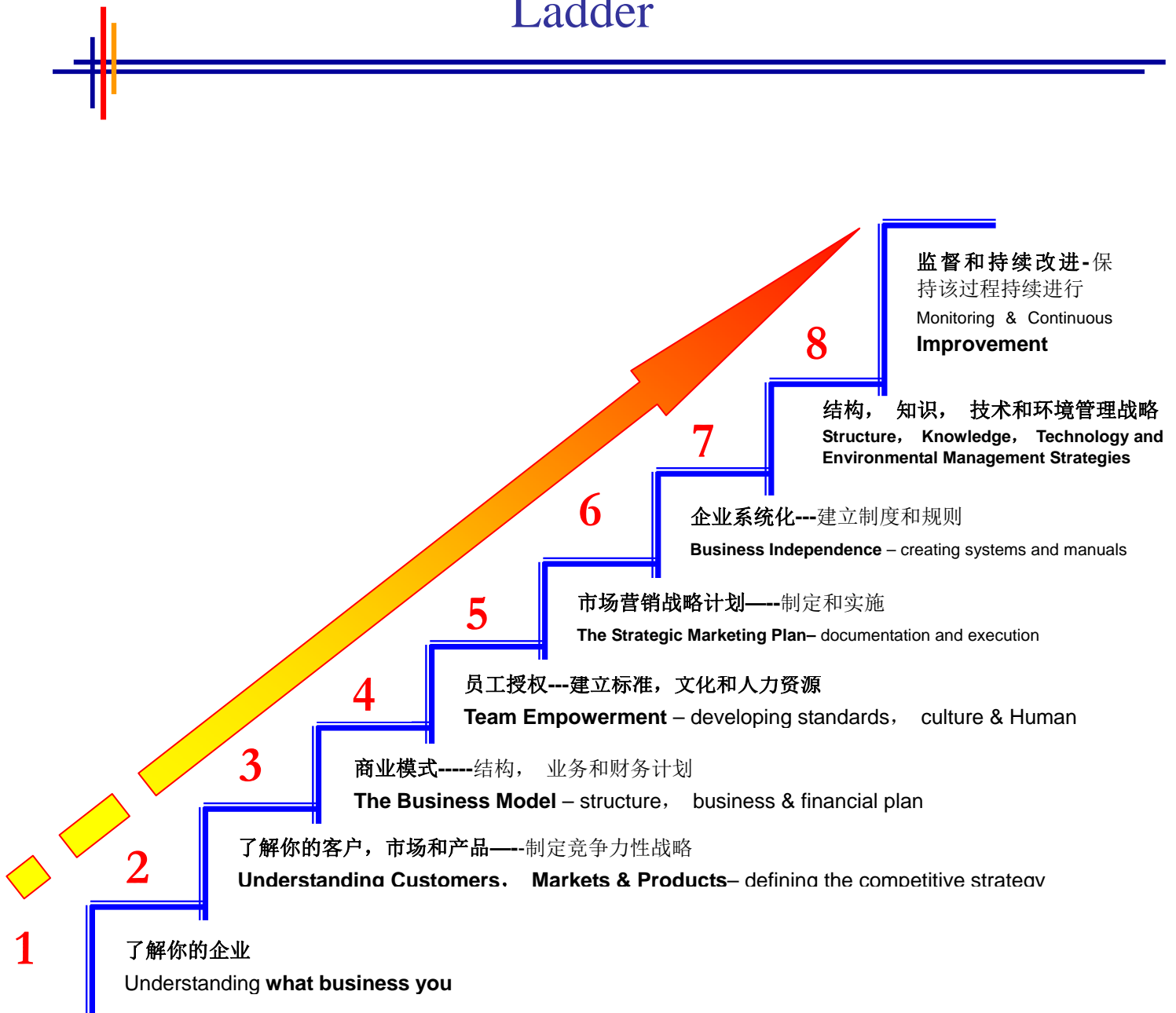
战略性经营业绩改善模式

The Strategic Business Performance Improvement Model



八模块企业发展阶梯

The 8 Module Business Development Ladder



模块一：了解你的企业

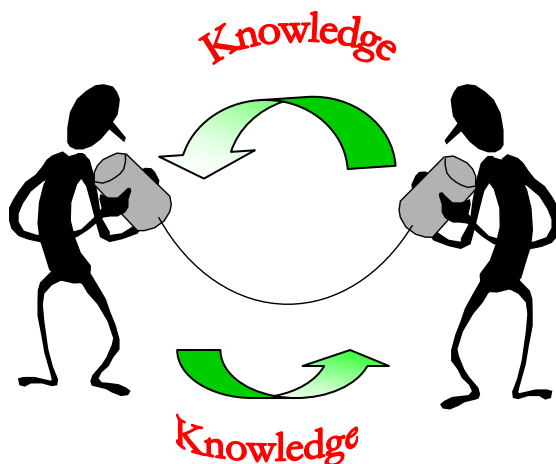
Module 1: Understanding What Business You Are In

概述

Overview

任何咨询业务的开始阶段都是非常重要的。作为咨询顾问，你所负责的是过程——这是需要特别引起你注意的，你几乎不太可能控制结果。你和你的客户一起开始了一个令人兴奋的旅程。在这个旅程中，客户和咨询顾问之间要进行双方向互动的知识交流。这种信息的交流过程本身同信息一样有价值。

The initial stage of any consulting assignment is particularly important. As the consultant you are responsible for the process – it is important to note, that it is almost impossible for you to control the outcome. You and your client are embarking on an exciting journey together. During this journey, knowledge will be transferred between both parties - the client and the consultant. The process of this information transfer is as valuable as the information itself.



各方都要了解自己在这一关系中所扮演的角色---你只是咨询项目的推动人，而不是客户业务的专家！

All parties must understand your role in the relationship – you are the facilitator of the program, you are not an expert in your client's business!

一般来讲，在项目的第一阶段，你要收集关于客户及其业务的信息。你还要召开你的第一次战略计划会议。第一阶段的目的是建立客户和咨询顾问之间的关系，并开始经营业绩改善项目的“计划”阶段。

Typically, during this first stage of the program you will gather information regarding your client and their business. You will also hold your 1st Strategic Planning Session. This first stage of the program is designed to develop the relationship between client and consultant and begin the “planning” stage of the Business Performance Improvement Program.


主要学习目标

Key Learning Objectives


下面的清单详细列举了模块一---- “了解你的企业” 主要学习目标的一些内容:
The following list details some of the Key Learning Objectives of Module 1 – Understanding What Business You Are In:

- 了解企业所有者 (或主要股东)的个人和企业目标, 并开始以所有者的个人目标为基础制定企业宗旨和/或远景;
To understand the personal and professional goals of the business owners (or key stakeholders), and begin to develop the Mission and/or Vision for the business based on the personal objectives of the owners;
- 了解企业当前财务和非财务方面的业绩情况概况;
To obtain an overview of the current financial and non-financial performance of the business;
- 了解企业所服务的市场, 及其产品在各自生命周期中所处的位置;
To understand where the business and each market is in its product life cycle;
- 了解如何评估企业的价值和系统化会给企业价值带来的影响;
To understand how businesses are valued and the impact that systematisation can have on the value of the business;
- 确认企业的战略优势, 劣势, 以及当前所面临的机会和威胁;
To identify the strategic strengths, weaknesses, opportunities and threats currently facing the business;
- 明确改善企业表现的立即行动点(IAPs);
To identify Immediate Action Points (IAPs) to improve the performance of the business;
- 明确企业面临的困境和通过实施 BPIP 来解决这些问题的方法;
To identify the frustrations of the business and ways in which the BPIP can assist to resolve those issues; and
- 建立咨询顾问和客户合作的基础——一种持续的关系
To establish the basis on which the consultant and client will work together – the on-going relationship.

工具 Tools

下列工具为你提供工作帮助。 这些工具与”需完成的任务”部分相互参照(用  表示)。

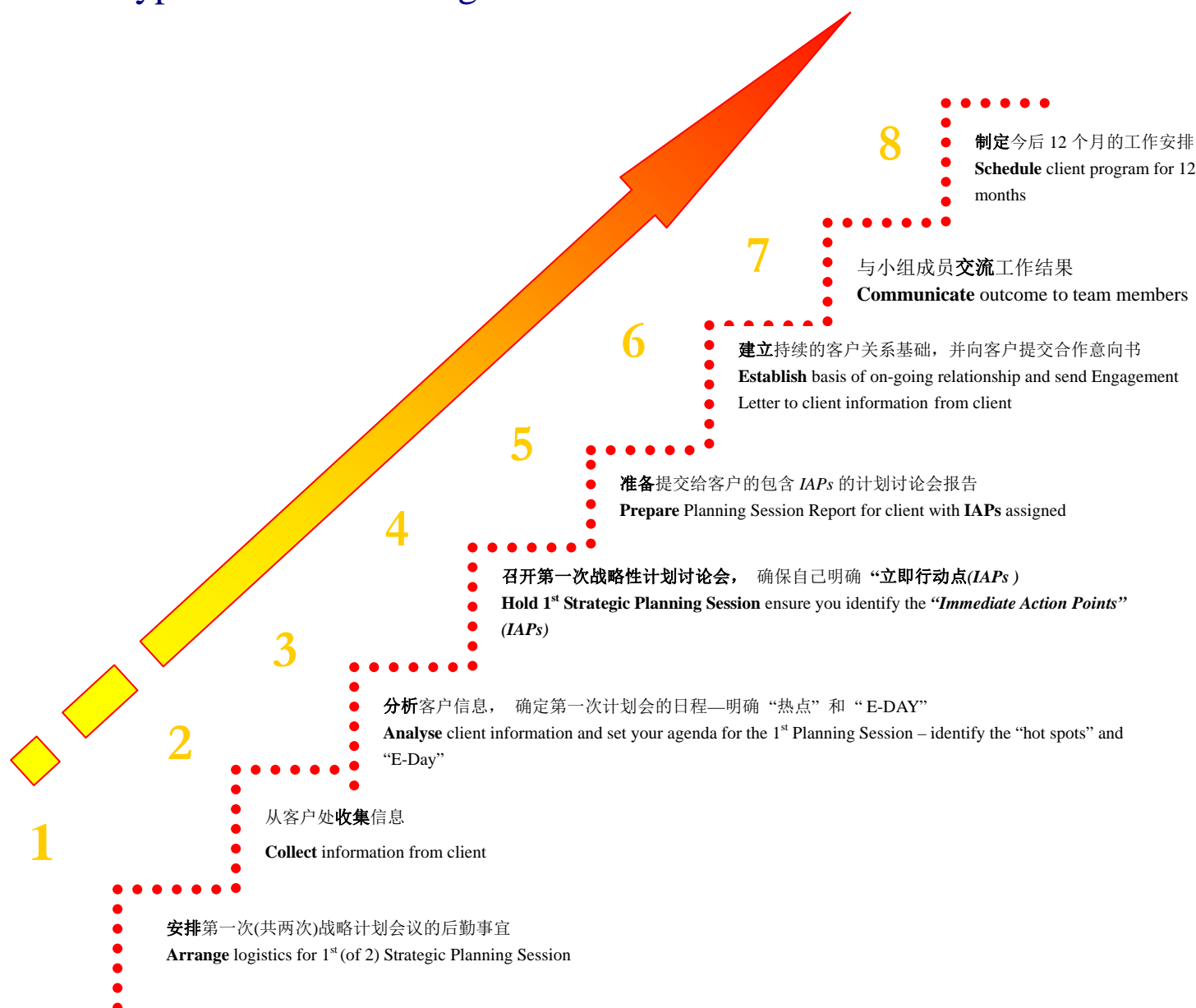
The following Tools have been provided to assist you. These Tools

are cross-referenced throughout the “Tasks to Be Completed” section (denoted by ).

- 第一次战略规划会议邀请函
1st Strategic Planning Session Invitation
- 第一次战略规划会议准备清单
1st Strategic Planning Session Checklist
- 战略需求分析问卷 (SNAQ)
Strategic Needs Analysis Questionnaire (SNAQ)
- 客户服务重点问卷
Customer Service Focus Questionnaire
- 利润潜力 (表格)
Profit Possibilities (Spreadsheet)
- 第一次战略规划会议议程
1st Strategic Planning Session Agenda
- 第一次战略规划会议 PowerPoint 演示稿
1st Strategic Planning Session PowerPoint Presentation
- 第一次战略规划会议报告模本
1st Strategic Planning Session Report Template
- 合作意向书模本
Engagement Letter Template
- 小组计划会情况汇报议程
Team Planning Session Debrief Agenda

典型的模块一程序

Typical Module 1 Program



需完成的任务

Tasks to Be Completed

1.1 安排第一次战略规划会议的后勤事宜

Arrange logistics for 1ST Strategic Planning Session

- 第一次战略规划会议大约进行 3--4 个小时。在此期间，你将教给企业的所有者如何分析他们所从事行业的性质和评估他们在每个市场上的竞争地位。你们还要一起研究 SNAQ 和完成一份立即行动点的清单。

The 1st Strategic Planning Session will take approximately 3-4 hours. During this time you will teach the business owners how to analyse the nature of the industry in which they operate and evaluate their competitive positioning within each market. Together you will also review the SNAQ and compile a list of **Immediate Action Points**.

- 这个会议还会给你提供更好地了解你的客户的机会。你应当利用这次会议来获得他们的信任和建立你们之间的合作关系。

The session also gives you the opportunity to get to know your clients better. You should use the session to gain their trust and build your working relationship.

- 确定会议的日期和时间。
Set the date and time for the session.
- 邀请客户——用信函/传真/电子邮件的形式确认这些安排。请参见 [“第一次战略规划会议邀请函”](#)
Invite the client – use a letter/fax/email to confirm arrangements. Please refer to [“1st Strategic Planning Session” Invitation](#)



- 向客户发出 “[战略需求分析问卷](#)”。
Send the [“Strategic Needs Analysis Questionnaire”](#) to the client.
- 安排会议地点——尽量使用中立性的地点——会议场所必须确保无干扰。
Arrange venue – try to use a neutral venue – there must be no distractions.
- 餐饮事项——应准备午餐和上下午茶。
Refreshments – lunch, morning and afternoon tea should be arranged.
- 会议设施——白板，白板笔，电脑（供 PowerPoint 演示之用），纸，笔，投影仪。请参见 [“第一次战略规划会议”准备清单](#)。
Equipment – whiteboard, marker pens, computer (for PowerPoint presentations), paper, pens, projector. Please refer to [“1st Strategic Planning Session” Checklist](#)



1.2 从客户处收集信息

Collect information from client

- 在第一次战略计划会议之前，你需要从客户处收集大量信息。

You will need to gather plenty of information on the client prior to the 1st Strategic Planning Session.

- 如果客户有网站的话，你应当浏览其网站。
If applicable you should view the business' web-site.

- 请客户提供给你他们所有的企业介绍和广告材料。
Ask the clients to send you any brochures or advertising material that they have.

- 你还需要客户的 3 年财务报表 (盈亏表，资产负债表和现金流量表)。还要请客户给你提供他们通常使用的管理报告。

You will also need 3 years of financial statements (Profit and Loss , Balance Sheet and Cash-Flow statements). Ask the client to also send you copies of any management reports that they routinely use.

- 你需要客户填写 SNAQ 问卷，并在会议前的至少 4--5 天把它交给你。这样，你才会有充足的时间来分析问卷，并为第一次战略计划会议作准备。
You will need the client to complete the SNAQ and return the information to you at least 4 –5 days prior to your meeting. This will give you enough time to analyse the completed questionnaires and make some notes for your 1st Strategic Planning Session.

- 客户还应当完成并交给你 “客户服务要点” 问卷。这一问卷是用来衡量企业提供优质服务方面



的表现。该问卷的结果在本项目的后面阶段会用到，并将用来同客户和员工的反馈结果相比较。

The client should also complete and return to you the **“Customer Service Focus” Questionnaire.**

This questionnaire is designed to gauge the organisations commitment to exceptional customer service. The results will be used later in the program and compare to feedback gathered from both customers and team members.

- 不要忘记询问客户，他们是否还有其它他们认为对你有用的信息。如果有，请他们提供给你。

Don't forget to ask the client if there is any other information that they think would be useful to you. If possible get the client to send you this information.

1.3 分析客户信息

Analyse client information

- 第一次战略计划会议一定要做非常充分的准备---这是一次很重要的会议，它将为你和客户的未来合作确定基调。要用 3 个小时重新审阅已填写完成的 SNAQ 和你所收集的其它信息。

You will need to prepare thoroughly for the 1st Strategic Planning Session – it is a very important meeting that will set the tone for your future engagement with the client. Allow 3 – hours to review the completed SNAQ and any other information you have gathered.

- 在阅读 SNAQ 时，应当注意的方面包括
While going through the SNAQ you should look for problem areas for example

- 企业所有者与其他主要决策人在目标和观念之间的冲突

Conflicts between the goals and ideals of the owners and other key decision-makers.

- 问卷中没有回答的部分(这也许反映了企业信息系统的弱点)

Areas where no information has been provided (this may indicate weaknesses in the business information systems)

- 答卷人对问题的理解明显错误的地方 Areas where the respondent clearly has misinterpreted the question

- 在阅读 SNAQ 时，把那些值得讨论的问题标出来，并找机会把该项目所能提供的服务与客户所面临的困境及问题联系起来。

As you go through the SNAQ, highlight areas

for discussion and look for opportunities to relate the value of your products and services back to the client's frustrations and problems.

- 用客户的财务数据填制 “利润潜力”。
Set up the **“Profit Possibilities”** using the client's financial data.
- 准备好会议的议程并发送给所有参加会议的人员
----请参见 “第一次战略计划会议议程” 模本。
Prepare an agenda for the session and send it to all participants – please refer to **“1st Strategic Planning Session Agenda” template**.



1.4 召开第一次战略规划会议

Hold 1st Strategic Planning Session

- 在第一次战略规划会议的开始部分，你要回顾企业所有者的个人和企业目标。你还要阐述企业价值评估的原则和系统化将如何提升企业的价值。请参见 [“第一次战略规划会议” PowerPoint 演示。](#)



During the first part of the 1st Strategic Planning Session you will be reviewing the business owners personal and business objectives. You will also be looking at the principles on which businesses are valued and how systematisation of the business can increase the value of the business. Please refer to [“1st Strategic Planning Session” PowerPoint Presentation.](#)

- 要记住，会议其间不要总是你一个人在讲话。如果让客户有机会谈论他们的某些问题和困境，他们会觉得收获更大。你要鼓励进行问题讨论，以制定一系列的行动来解决问题

Make sure that you **do not** do all the talking at the session. Clients will feel that they have received more value if they are able to express some of their problems and frustrations. Facilitate the discussion to generate a list of actions to address the frustrations.

- 在会议其间，要逐一讨论你从 SNAQ 中发现的问题或弱点。当客户表述这些问题时，你可以将它们与你可以提供的用于解决这些问题的工具联系起来，例如，客户咨询会，优质服务培训等。
During the session work through the areas of the SNAQ where you have identified problems or weaknesses. As the client expresses problems relate back to them the different tools that you have to deal with those issues e.g. the Customer Advisory Session , Exceptional Service

Training etc

- 记住， 要确定一些 “立即行动点” (IAPs)。 这是客户可以立即在企业内实施的行动。 有些 IAP 可以对企业的赢利能力产生立竿见影的作用， 例如， 提高价格。 要切记， 是客户在实施这些行动， 而不是你。

Make sure that you identify some “**Immediate Action Points**” (IAPs). These are items that the client should implement in their business as soon as possible. Some of the IAPs should have an immediate impact on the profitability of the business e.g. increase prices. Remember that the emphasis should be on the client performing the action, **not you**.

1.5 给客户准备包含 IAP 的战略计划会议报告

Prepare Strategic Planning Session report for client with IAPs assigned

- 会议之后，你需要向客户提供一份报告。这份报告要把这几天的事件写出“简要总结”。它包括：
After the session you will need to provide a report for the client. The report should provide an “Executive Summary” of the days events. It includes:

- 给客户的祝贺函；
Congratulations letter for the client;
- 简要总结；
Executive Summary;
- 立即行动点；
Immediate Action Points;
- 月度会议安排；
Schedule of monthly meetings;
- 小组会议的计划日期；
Scheduled date for team meeting;
- 所有提出的问题的详细内容，参阅行动清单；
Details of all the issues raised ,
cross-referenced to the action list;
- 相互承诺声明；
Mutual Commitment statements; and
- 详细的行动清单，与你所提供的产品，以及 BPIP 项目中的相关模块相结合。
A detailed action list cross-referenced to the products you offer and the relevant

Module of the BPIP program.

- 行动清单应当非常具体，并分解为短期行动，如，IAP，和长期行动。

The action list should be specific and split into short-term e.g. IAPs and longer-term actions.

- 报告的模本已提供-----请参见 [“第一次战略规划会议报告”模本。](#)

A template for the report has been provided – please refer to [“1st Strategic Planning Session Report” template.](#)

- 报告应当在会议之后的 7 天内送给客户。并记住在报告发出的一两天后给客户打电话确认他们收到了该报告。

The report should be sent to the client within 7 days of the session. Ensure that you call the client a couple of days after sending the report to ensure that they received it.



1.6 建立持续的关系基础， 并将合作函发给客户

Establish the basis of the on-going relationship and send an Engagement Letter to the client.

- 在计划讨论会期间，你将确立起你和客户的持续合作关系的特点。

During the Planning Session you will have established with your client the nature of your on-going relationship.

- 持续性关系有两种形式。 你或者会使客户接受全部的 BPIP 计划， 或是会把一些服务捆绑在一起， 例如， CAS， TAS， 或者“优质服务—争创第一”培训等。

Two alternatives exist for the on-going relationship. You will either have engaged the client in the full BPIP program or you will have bundled some services together such as the CAS, TAS or “Exceptional Service – Leading The Pack” seminar.

- 理想的情况是， 你应当把合作函与第一次战略规划会议的报告一起送给客户。 这个工作必须在客户对这次会议还记忆犹新的时候完成， 大约在会后的 4--5 天内。

Ideally you should send the Engagement Letter with the 1st Strategic Planning Session Report. This **must** be done while the session is still fresh in the clients' mind, approximately 4-5 days after the session.

- 你需要以合作函的方式来确认你的安排。 请参见 [“合作函” 模板](#) 的样稿。 该文件包括下列内容：

You will need to confirm your arrangement using an Engagement Letter. Please refer to the sample [“Engagement Letter” template](#)



provided. This letter contains the following:

- 你和客户将一起从事的工作的大纲;
An outline of the work you will be doing together;
- 双方认可的费用 (有可能的情况下, 应当安排客户以直接银行转帐的方式付款)
The fees you have agreed upon (where possible you should try to arrange for payment to be made by direct bank transfer);
- 双方相互承诺声明;
Your mutual commitment statements ;
and;
- 你的权力与义务。
Your terms and conditions.

一两天后与客户就此事做进一步的联系。

Follow up with the client a couple of days later.

1.7 与你的小组成员一起交流 SPS 的结果

Communicate outcomes of SPS to your team members

- 这个阶段只适用于那些需要有其他咨询顾问一起参与工作的顾问。

This stage is only applicable to those consultants that have other team members working with them.

- 让你的小组成员了解第一次战略计划会议的结果是很重要的。在 BPIP 项目实施的初期，这一点尤其重要。你的小组成员需要了解该项目的接受程度如何。这会给他们动力把整个项目一体化，并考虑其他客户是否会对这种新的服务感兴趣。

It is important to keep your team informed on the outcomes of the 1st Strategic Planning Session. This is particularly important during the early days of the implementation of the BPIP program. Your team members will need to hear how well the program is being received. This will give them the **motivation to integrate the program** and think of other clients who would be interested in the new services.

- 这种会议还应当被用来激发如何改进该项目的思路。

The meeting should also be used to **generate ideas** on how to improve the program.

- 要为这次会议准备议程。议程内容应包括：
An agenda should be prepared for the meeting. Agenda items should include”

- 客户背景；
Background of the client;

- 与该客户的第一次联系是如何形成的；
How contact was first established with this

client;

- ➡ 会议期间提出的问题;
The items raised during the session;
- ➡ 确认的行动要点;
The identified action points;
- ➡ 持续关系的特点;
The nature of the on-going relationship;
and
- ➡ 头脑风暴提出的新想法。
Brainstorming for ideas.

- 请参见 [“小组计划会议情况汇报” 议程。](#)
Please refer to [“Team Planning Session Debrief” Agenda.](#)



1.8 做出今后 12 个月的客户计划安排

Schedule client program for the next 12 months

- 把战略计划会议报告和合作函发给客户。
Send the Strategic Planning Session Report and Engagement Letter to the client.
- 把安排好的今后 12 个月的日期包括在计划中；
Include details of scheduled dates for the next 12 months including:
 - 每月的 2 个小时的 BPIP 战略管理会议；
The monthly 2 hour BPIP Strategic Management Meeting;
 - 第一次小组简要会议；
The 1st team briefing session;
 - 第一次客户咨询会；
The first Customer Advisory Session;
 - 员工咨询会
The Team Advisory Session; and
 - 优质服务—争创第一培训
Exceptional Service – Leading The Pack training.
- 在自己的工作日记上标出这些日期。
Diarise these dates in your own diary.

模块二:了解顾客、市场和产品

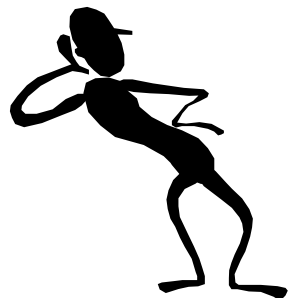
Module 2: Understanding the Customers, Markets and Products

概述 Overview

顾客的反馈极其重要。销售是企业的生命线，销售的增加对企业的增长至关重要。
Feedback from customers is extremely important. Sales are the lifeblood of any organisation and increasing the level of sales generated is vital to growing the business.

在模块二里，你需要开始同企业的顾客交谈，了解他们对企业及其运作的真正感受。如果我们花足够的时间去询问，顾客是非常乐于告诉我们他们对企业喜欢和不喜欢的方面。这些信息将成为你要进行的企业改善的基础。

During Module 2 you will need to begin talking to the clients' customers to find out how they really feel about what the business does and how they do it. Customers are more than willing to tell us what they like and dislike about our business if we take the time to ask them. This information will be used as one of the foundation blocks of the improvements you will be making to your business.



在获得顾客反馈之前，你需要得到员工的帮助。在 BPIP 项目的早期得到员工的支持是非常重要的，特别是要考虑到，对企业的很多改善建议将来自于他们。他们也是负责实施这些改善和使企业取得成功的人。

Prior to seeking customer feedback you will need to enlist the help of the team members. It is critical to get team member support to the BPIP early in the program, especially when you consider that many of the suggestions for improvements to the business will come from the team. They will also be the people who are responsible for implementing those changes and making the business a success.

从经验中我们发现，较早地让员工参与进来，将加速改善的进程，并形成一支更具动力的团队！

Through our experience we have found that involving your people early will accelerate the progress you make and result in more a more motivated team!


主要学习目标 Key Learning Objectives


下面详细列举了模块二----“了解你的顾客，市场和产品”的主要学习目标的一些内容：

The following list details some of the Key Learning Objectives of Module 2 – Understanding the Customers, Markets and Products:

- 使员工参与经营业绩改善项目；
To engage and commit team members to the Business Performance Improvement program;
- 了解顾客的需要和要求；
To understand the needs and wants of the customers;
- 了解顾客认为企业哪些方面做得很好，哪些方面希望企业改进；
To learn what your customers think you do really well and what improvements they would like to see you make;
- 把这些需要和要求应用到现有的产品中；
To apply the needs and wants to the current product offering;
- 评估未来的产品、市场和竞争战略；
To evaluate future product, market and competitive strategies;
- 分析评价企业内部目前对客户服务的执行情况；
To assess the present internal commitment to customer service;
- 着手确定企业的“A”类顾客；
To begin to identify your “A” class customers; and
- 分析现有客户基础，并明确企业未来希望发展的客户类型
To analyse the current client base and identify the type of clients that you wish to work with in the future

工具 Tools

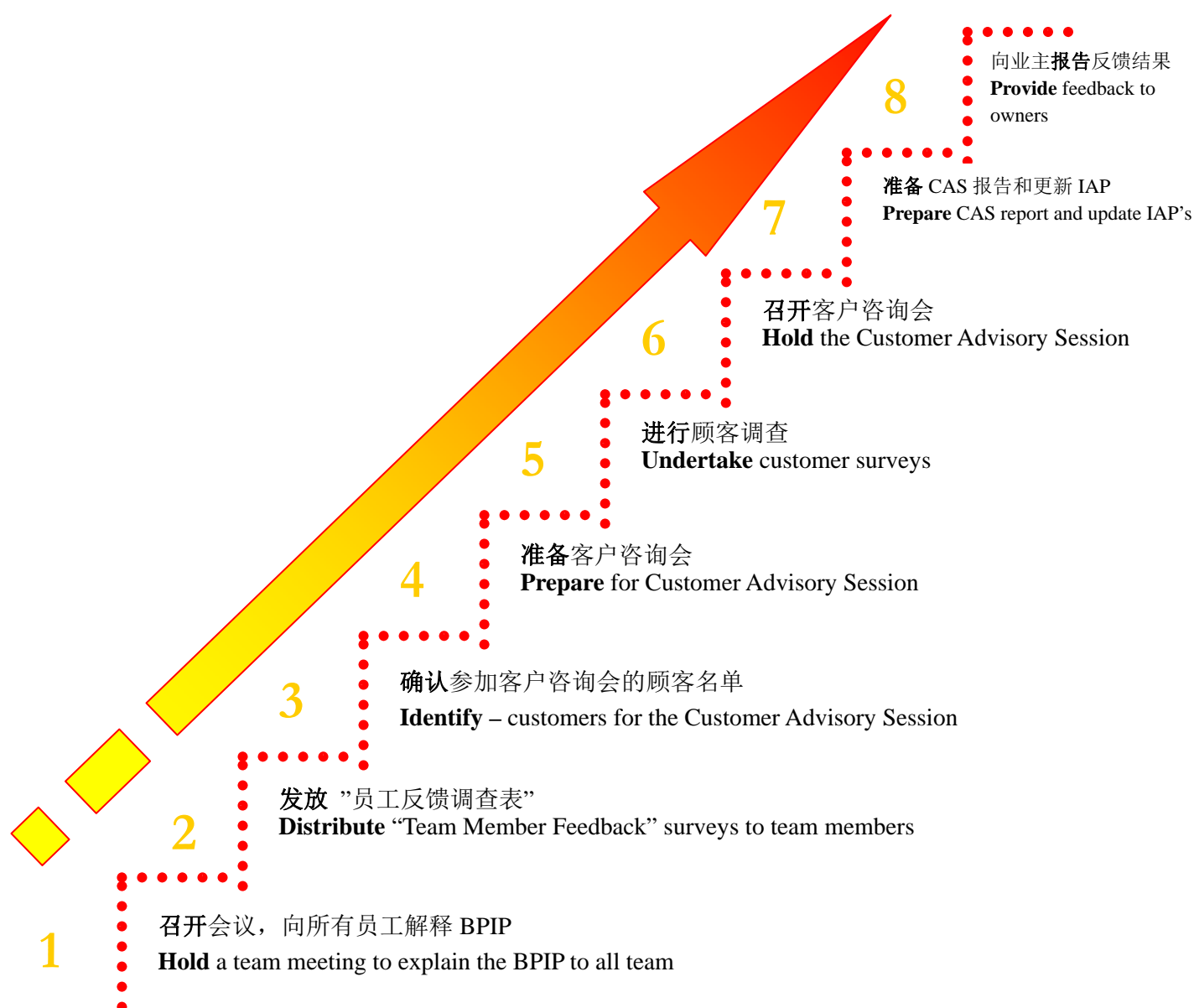
下面是可以帮助你工具。 这些工具与“需完成的任务”部分相互参照 (以  表示)。

The following Tools have been provided to assist you. These Tools are cross-referenced throughout the “Tasks to Be Completed” section (denoted by ):

- 第一次员工会议邀请函
1st Team Meeting Invitation
- 第一次员工会议议程模本
1st Team Meeting Agenda Template
- 第一次员工会议准备清单
1st Team Meeting Checklist
- 第一次员工会议 PowerPoint 演示
1st Team Meeting PowerPoint
- 直接与本企业员工对话授权书
Authority to Talk Directly to My Team Members Form
- 员工反馈文件包 (包括企业所有者致函, 咨询顾问致函, 员工反馈调查问卷)
Team Member Feedback Packs (includes a letter from the owners, a letter from the consultant, Team Feedback Survey)
- 员工反馈分析表格
Team Feedback Analysis Spreadsheet
- 员工反馈报告模本
Team Feedback Report Template
- 客户咨询会资源模板 (包括 邀请信样本, CAS 准备清单, 会议议程样本, CAS 主持人手册, CAS 反馈表, CAS 感谢信, 调查模本和企业所有者/总经理或首席执行官的调查致函, 咨询顾问的致函, 调查感谢信, CAS 报告模板)
Advisory Session Resource Pack (includes sample invitation, CAS checklist, sample session agenda, CAS Facilitator Guide, CAS

Feedback Form, CAS thank-you letters, survey template and survey letter from business owner/ Managing Director or CEO, letter from the consultant, survey thank-you letter, and CAS Report template)

典型模块二程序 Typical Module 2 Program



需完成的任务 Tasks to Be Completed

2.1 召开员工会向所有员工解释 BPIP

Hold a team meeting to explain the BPIP to all team members

- 得到所有员工的支持是很重要的。你需要向他们说明，他们的看法对企业所有人是如何重要。你还应该概述他们在改善项目中的参与程度以及他们将如何为企业提供帮助。

It is important to get the support of all team members to the program. You need to explain how important their views are to the owners of the business. You should also outline their involvement in the program and how they will be assisting the business.

- 记住，你要做出会议的议程---请参见 [“第一次员工会议议程”模本](#)。会议应该包括以下内容：
Ensure that you have an agenda for the meeting – please refer to [“1st Team Meeting Agenda” template](#). The meeting should cover the following:



- 项目概述
Overview of program
- 企业远景规划
Vision of the business;
- 第一次战略计划会议概述;
Overview of the 1st Strategic Planning Session;
- 客户咨询会的目的
Purpose of the Customer Advisory Session

➤ 员工反馈文件包

Explanation of Team Feedback Packs

- 提供有 PowerPoint 演示稿， 见 [“第一次员工会议 PowerPoint 演示稿” 模本](#)

A PowerPoint presentation template has been provided, [“1st Team Meeting PowerPoint Presentation” template.](#)



- 理想的话， 第一次员工会议应该在一种轻松的环境下进行。 我们建议安排在周五的下午进行， 并提供一些食品饮料。 请参见 [“第一次员工会议”准备清单。](#)

Ideally, this first meeting should have a social element to it. We suggest that it is held on a Friday afternoon and that light refreshments are arranged. Please refer to [“1st Team Meeting” Checklist](#)



- 需要将[“员工反馈文件包”](#) 发下去。
[“Team Feedback Packs”](#) will also need to be distributed.



2.2 发放员工反馈表

Distribute team member feedback forms

- 在发放员工反馈文件包之前，你必须取得企业所有者的书面授权，允许你同其员工进行沟通。请参见 [“直接与本企业员工对话授权书”](#)。



Before you distribute the Team Member Feedback Packs you will need to get written authority from the business owners to communicate with their team members. Please refer to [“Authority to Talk Directly to My Team Members Form.”](#)

- 在会上就员工反馈进行说明，并解释其目的。[“员工反馈文件包”](#) 应在做完说明后发放。这些文件包括：



At the meeting explain that team feedback is being sought and the purpose of the feedback. The [“Team Member Feedback” Packs](#) should be distributed following the presentation. These packs contain:

- 一封 [“来自老板/总经理或首席执行官的信”](#)，阐明员工反馈的重要性，及其如何能够帮助企业的发展更上一层楼；



A [“letter from the business owners / Managing Director or CEO”](#) stating how much the team member feedback is valued and how it will assist the business to go to the next level;

- 一封 [“来自咨询顾问的信”](#)，讲解如何完成这份调查，并保证调查的结果绝对保密。这封信还应该说明，调查的结果会写成报告，向所有员工公布。一定要规定交回调查表的最后期限。调查表应直接交给咨询顾问；



A [“letter from the consultant”](#) that provides instructions on how to complete the survey and assurances that survey

responses will be kept confidential. The letter should also state that a report summarising the results will be prepared and made available to all team members. A **deadline for the return of the surveys** must be given. Surveys should be returned directly to the consultant; and

- “员工反馈问卷”旨在了解员工对客户服务，管理风格，产品和服务，市场营销的看法。



The “Team Member Feedback Questionnaire” is designed to explore the team members’ perceptions of customer service, management style, products and services, markets and roles.

2.3 确认参加客户咨询会的顾客名单

Identify customers for the Customer Advisory Session

- 企业所有者需要确定他们希望谁被邀请参加客户咨询会
The business owners need to identify who they wish to invite to the Customer Advisory Session

- 向企业的所有者解释， 他们应该邀请 “A”类顾客参加客户咨询会
Explain to the business owners that they should invite their “A” Class customers to the Customer Advisory Session

- 说明， “ A”类顾客是那些对企业最有价值的顾客。 他们给企业带来最多的价值----他们具有赢利性， 与其做生意非常容易。 客户咨询会应该力图确认 “A” 类顾客的需要和要求， 这样， 企业就可以制定能够吸引更多 “A” 类顾客的战略。

Explain that “A” class customers are the ones that are most valuable to the business. These customers add the most value to the business – they are profitable and easy to deal with. The Customer Advisory Session should seek to identify the needs and wants of “A” class customers so that the business can then identify strategies in order to attract more “A” class customers

- 企业所有者应该很容易地确定 “A” 类顾客的名单。 这些顾客应该被邀请参加客户咨询会。

The business owners should be able to easily identify a list of customers who they consider to be “A” class. These customers should be the ones that are invited to the Customer Advisory Session.

- 通过对顾客分类， 企业可以开始侧重关注 “A” 类顾客的需要和要求， 并制定可以吸引更多此类顾客的方法。 这是“四种企业增长的方法”的四项原则之一----增加你希望的那类顾客的数量!

By categorising the customers, the business can begin to **focus on the needs and wants of “A” class**

customers and define ways in which the business can attract more of this type of customer. This is one of the 4 key principles of “The 4 Ways To Grow Your Business” – *increasing the number of customers – of the type you want!*

- 在这个阶段，企业所有者只要非正式地确定“A”类顾客就可以了。在本项目的后期阶段（第五阶段----市场营销战略计划）企业所有者将有一个正式确定其“A”类顾客的程序。
At this stage, it is sufficient for the business owners to informally identify their “A” class customers. Later in the program (Module 5 – The Strategic Marketing Plan) the business owners will go through a formal process for identifying “A’ class customers.

2.4 准备客户咨询会 (CAS)

Prepare for the Customer Advisory Session (CAS)

- 客户咨询会(CAS) 的目的在于从这些主要顾客 (“A”类顾客)那里获得详细的反馈。 来自这些顾客的反馈是非常积极性的----他们乐于被征询意见，他们对企业的忠实程度通常随着参与这种活动而增强。 请参见 [“咨询会”资源文件包](#)。



The customer advisory session (CAS) is designed to seek detailed feedback from the key customers (*the “A” class customers*). Feedback from customers who attend these sessions is very positive – they enjoy being consulted and their loyalty to the business normally increases as a result of their participation. Please refer to [“Advisory Session” Resource Pack](#).

- CAS 的理想规模是 10 到 12 个顾客之间。我们建议由一个中立方代表(咨询顾问)主持会议。

The ideal group size for the CAS is between 10 and 12 customers. It is recommended that a neutral party (consultant) facilitate the session.

- 应将顾客反馈集中在一个范围的问题之内，但是，其目的是找出那些顾客对企业满意的方面，和他们希望企业改变的方面（包括需要进行什么样的改变）。Customer feedback can be sort on a range of issues but the aim is to find out those things about the business that they really like and those areas where they would like to see changes (including, what those changes would be).

- 应当向顾客寄发 [“书面邀请”](#)---请参见 [“建议会”资源文件包](#)。



Customers are generally sent a [“written invitation”](#) – refer to [“Advisory Session” Resource Pack](#).

- 有些企业还给参加客户咨询会的顾客提供一份报告, 详细说明他们在得到顾客的反馈后打算实施的改进。

Some businesses choose to send a report to the customers who attended detailing what improvements they are going to implement as a result of the feedback received.

- CAS 可以录音。这样可以使企业所有者在会后听这些录音。我们的经验是, 录音并不会对顾客的参与水平产生负面影响。

The CAS can be audio taped. This allows the business owners to listen to the session afterwards. Our experience is that audio taping the sessions **does not affect** the level of customer participation.

2.5 进行顾客调查

Undertake customer surveys

- 顾客调查必须先做草案，并应当包括那些在 CAS 上将要讨论的问题。[“调查模本”](#)可以在咨询会资源文件包中找到。



Customer surveys must be drafted and should focus on the same topics as those that will be discussed at the CAS. A [“survey template”](#) can be found in the Advisory Sessions Resource Pack.

- 所有接到邀请但没有参加 CAS 的顾客，都应当要求其填写一份调查。其他的顾客也应当被选择来参加调查。

All invitees who decline the invitation to the CAS should be asked to complete a survey. Other customers should also be selected to survey.

- 这份调查还应当包括 [“来自老板/总经理或首席执行官的信”](#)，说明顾客的建议如何重要，如何有助于企业为他们提供更好的服务。该信的样本包括在 [“咨询会”资源文件包](#)里。



The survey should also include a [“letter from the business owners / Managing Director or CEO”](#) stating how much the customer’ feedback is valued and how it will assist the business to better serve them. A sample is included in the [“Advisory Session” Resource Pack](#).

- 本调查应当包括一封“来自咨询顾问的信”，该信要说明如何完成调查问卷，并保证调查的内容绝对保密。该信还应当向参加调查的顾客解释，企业将通过何种方式就其根据反馈结果而采取的改进措施，与其进行沟通。该信的样本在 [“咨询会”资源文件包](#)可以找到。



The survey should include a [“letter from the consultant”](#) that provides instructions on how to

complete the survey and assurance that survey responses will be kept confidential. The letter should also explain how the participants will be kept informed of improvements made to the business as a result of their feedback. A sample letter is included in the **“Advisory Session” Resource Pack.**



- 理想的话，所有参加调查的人在完成调查后都应当收到一封**“感谢信”**。请参见**“咨询会资源文件包”**。

Ideally, all participants should receive a **“thank-you letter”** after completion of the survey. Please refer to the **“Advisory Session Resource Pack.”**

2.6 召开客户咨询会

Hold the Customer Advisory Session

- 客户咨询会一般在 2.5 到 3.5 小时之间。
The Customer Advisory Session will take between 2¹/₂-3¹/₂ hours.
- 企业应给每位参加者准备一份礼物，以感谢他们的参与。
The business should provide a gift to participants to thank them for their participation.
- 后勤工作要做好。如果有可能，会议应录音。你需要准备白板，纸，笔，录音设备和点心饮料。请参见 [“CAS 准备清单”](#)。
Logistics will need to be arranged. Where possible the session should be audio taped. You will require a whiteboard, paper, pens, recording equipment and refreshments. Please refer to the [“CAS Checklist”](#).
- 应向每位与会者提供 [“会议议程”](#) (以帮助促进会议的进行---与会者可以按照安排讨论问题)。
Copies of the [“Session Agenda”](#) should be provided to each participant (to assist in the flow of the session – participants will be able to follow the questions).
- 主持人在会议期间要在白板上做记录，包括 (顾客提出的)短期和长期的行动建议。请参见 [“咨询会资源文件包”](#) 中的 [“CAS 主持人手册”](#)。
The facilitator should take notes on the whiteboard during the session including a list of recommended (by the customers) short and long-term actions. Please refer to the [“CAS](#)



Facilitator Guide within the **“Advisory Session Resource Pack”**.

- 对顾客的参会给予诚挚的感谢，并告之其企业将如何与他们保持进一步的联系。确保参会者是以企业“拥护者”的心态离开会场。要确保他们填写了会议反馈表----请参见 **“咨询会资源文件包”** 中的 **“CAS 反馈表”**。



Ensure that the participants are **sincerely** thanked for their participation and told “how” the business will follow up with them. The participants should leave as “**advocates**” for the business. Ensure they fill in session feedback forms – please refer to **“CAS Feedback Form”** in the **“Advisory Session” Resource Pack**.

- CAS 开完的第二天，要给每位参加者寄发一封 **“感谢信”**。样本可在 **“咨询会资源文件包”** 中找到。



The day after the CAS a **“thank-you letter”** should be sent to each participant. A sample letter can be found in the **“Advisory Session Resource Pack”**.

2.7 准备 CAS 报告和更新 IAP

Prepare CAS report and update IAPs

- 会议之后，你需要给客户企业提供一份报告。报告内容需要包括：

After the session you will need to provide a report for the client. The report needs to include:

- 报告摘要；
Executive Summary;
- 会议概述。例如，地点，参加人数等；
Overview of session e.g. Location , number of attendees etc;
- 问题和顾客反映综述；
A review of the questions and customer responses;
- 建议的行动清单。行动清单应当具体，并分解为短期，例如 IAP，和长期行动。在可能的地方，将行动与 BPIP 项目的相关模块联系起来。
Suggested Action List. The action list should be specific and split into short-term e.g. IAPs and longer-term actions. Where possible relate the actions back to the relevant Module of the BPIP program;
- 总结顾客调查反馈 (如果有的话)；
Summary of customer survey feedback (if applicable);
- 对所有提出的问题的详细描述，与行动清单相互参照；
Details of all the issues raised , cross-referenced to the action list;

- 参加会议的人员名单;
A list of attendees; and
- 填写完成的会议反馈表的复印件。
Copies of the completed session feedback forms.
- 行动清单中的行动必须针对顾客对企业最不满意的
地方。The action list must address the major
frustrations that the customers have with the
business.
- 提供有报告的模本----请参阅“[建议会资源文件包](#)”
中“[CAS 报告](#)”模本。
A template for the report has been provided –
please refer to “[CAS Report](#)” template in the
“[Advisory Session](#)” Resource Pack.



2.8 向企业所有人提供反馈

Provide feedback to owners

- 与企业的所有者见面，并向他们通报 CAS 会议的概况。这项工作应当在 CAS 结束后尽快进行（在完成 CAS 报告之前）。

Meet with the business owners and provide them with an overview of how the CAS went. This should happen as soon as possible after the CAS (prior to completing the CAS report).

- 简要地回顾会议进行的情况，例如，有多少顾客参加，他们总的情绪如何等。

Briefly review how the session went e.g. how many customers attended, what their general mood was etc.

- 向企业所有者通报会上提出的最重要的问题。这些可能是他们希望马上就解决的问题----消除主要顾客的不满是提高销售量的关键之一。

Provide the owners with the most significant issues that were raised. There may be things that the owners wish to address immediately – removing key customer frustrations is one of the keys to increasing you sales.

- 讨论 5 件短期和长期都需要解决的最主要的事情。

Discuss the 5 most critical things that need to be addressed in both the short and long-term.

- 与企业所有者一起讨论 CAS 报告的撰写形式。应征求以下人员的反馈意见：

Together, review how the CAS report will be formatted. Decide upon the format of feedback to be provided to:

➡ 参加会议的人员；

Participants;

➡ 完成并交回调查问卷的人员;

Survey respondents;

➡ 其他顾客 (未被邀请参加会议的);

Other customers (who were not invited);
and

➡ 员工。

Team Members.

- 就反馈发送的时间表达成一致, 例如, 各种报告如何以及何时发送给各方人员。

Agree on a timetable for the distribution of the feedback e.g. how and when the various reports be distributed.

模块三:确定商业模式

Module 3: Defining the Business Model

概述

Overview

模块三---确定商业模式，是经营业绩改善项目的一个主要里程碑。这个阶段的目的是明确企业今后经营的方式，也就是，确定企业未来的经营战略。

Module 3 – Defining the Business Model, is a key milestone in the Business Performance Improvement Program. The purpose of this stage is to define the way in which the business will operate in the future – to define the future business strategy.

为此目的，我们首先要考察企业所在的行业竞争特点。然后需要决定企业是否应当继续在这个行业里发展。

In order to do this we will first need to examine the competitive nature of the industry in which the business operates. The decision then needs to be made – should the business continue to operate in this industry?

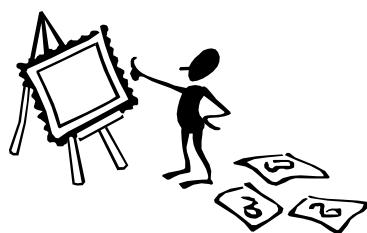
假设对这个问题的答案是“应当”，则企业需要决定他们应当如何进行竞争，即，明确他们的竞争战略。

Assuming that the answer to this is yes, the business then needs to decide how they will compete – define their competitive strategy.

一旦竞争战略制定完毕，就必须作出资金的预测，以保证企业能够达到其财务的经营目标。这个过程还将涉及评估企业的流动资金和融资需要。

Once these strategic decisions have been made, financial forecasts must be constructed to ensure that the business can meet its' financial objectives. This will also involve examining the working capital and funding requirements of the business.

在所有这些决策都完成后，企业就可以开始起草本企业的战略计划，详细阐明他们将如何实现他们的目标。



Once all these decisions have been made the business is ready to start documenting the Strategic Business Plan – detailing how they will achieve their objectives!

主要学习目标

Key Learning Objectives


下列清单详细列出了模块三----“商业模式”的主要学习目标的一些内容:


The following list details some of the Key Learning Objectives of Module 3 – The Business Model:

- 了解企业所处的竞争环境的特点;
To understand the nature of the competitive environment in which the business operates;
- 了解影响该企业经营的主要因素;
To understand the key influences working on the business;
- 制定企业当前的竞争战略;
To establish the current competitive strategy of the business;
- 探索企业未来的最佳竞争战略;
To explore the optimal future competitive strategy for the business;
- 建立企业的第一个收益模式, 然后评估已提出的竞争战略的可行性;
To draft the first revenue model for the business and thus evaluate the feasibility of the proposed competitive strategies;
- 正式确定企业远景规划;
To finalise the Vision of the business;
- 了解今后的流动资金和融资需要;
The understand the working capital and funding requirements moving forward; and
- 开始撰写企业战略计划。
To start documenting the Strategic Business Plan.

工具

Tools

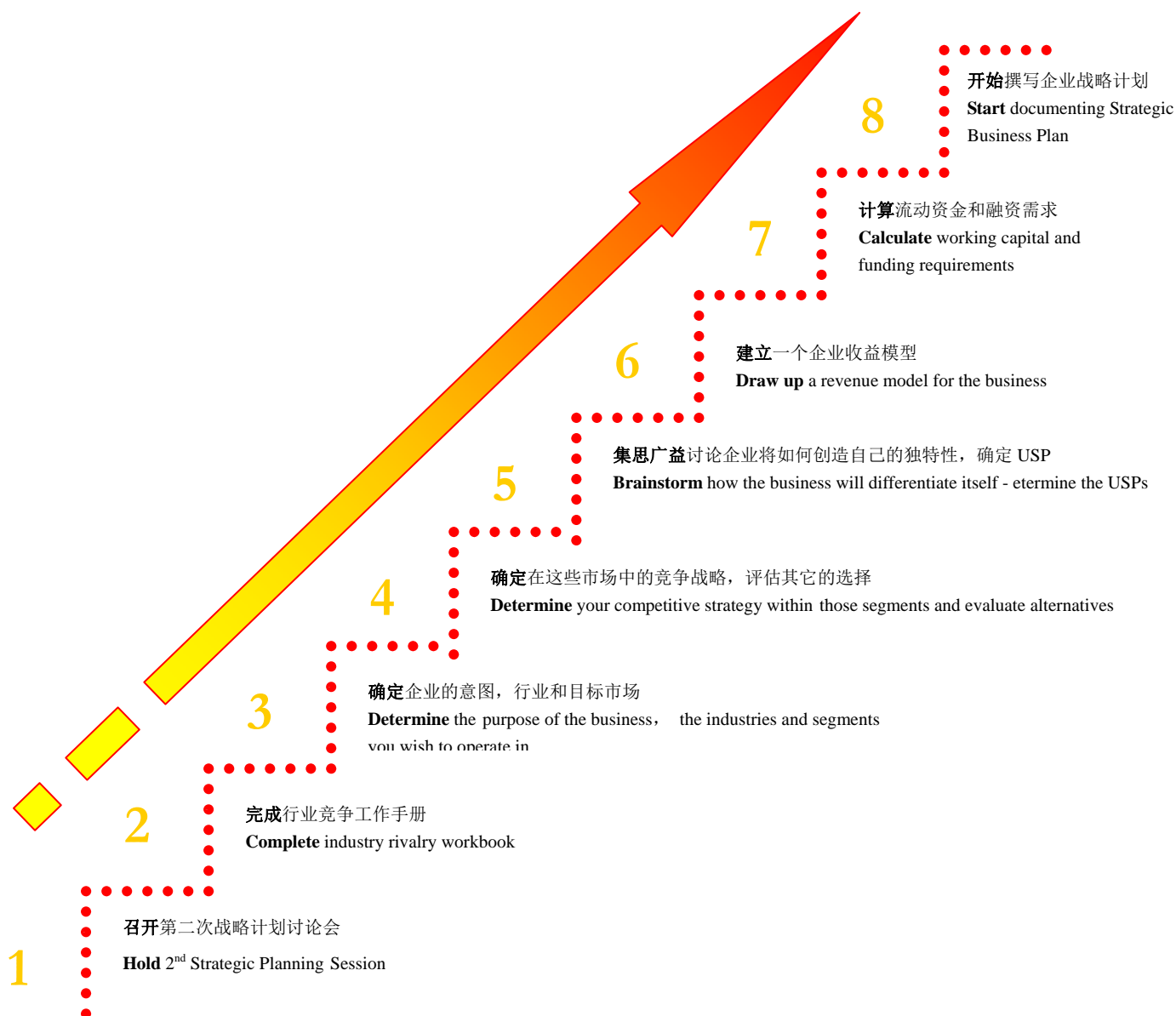
下列工具可以帮助你工作。这些工具与“需完成的任务”部分相互参照(以  表示)。

The following Tools have been provided to assist you. These Tools are cross-referenced throughout the “Tasks to Be Completed” section (denoted by ).

- 第二次战略规划会议邀请函
2nd Strategic Planning Session Invitation
- 第二次战略规划会议议程
2nd Strategic Planning Session Agenda
- 第二次战略规划会议准备清单
2nd Strategic Planning Session Checklist
- 波特（Porter）行业和竞争模式 PowerPoint 演示稿
Porter Industry Rivalry and Competition Model PowerPoint Presentation
- 行业竞争分析工作手册
Industry Rivalry Analysis Workbook
- “企业定位” PowerPoint 演示稿
“Positioning Your Business” PowerPoint Presentation
- 企业定位工作手册
Position Your Business Workbook
- USP 头脑风暴会议程
USP Brainstorming Session Agenda
- USP 头脑风暴会准备清单
USP Brainstorming Session Checklist”
- USP 行动计划
USP Action Plan

- 预测样本 (包括损益表, 资产负债表和现金流量表)
Forecast Examples (including Profit and Loss, Balance Sheet and Cash Flow Statements)
- 计算你的流动资金需求和盈亏平衡点的 PowerPoint 演示稿
Calculating Your Working Capital Requirements and Breakeven PowerPoint Presentation
- 流动资金需求和盈亏平衡点工作手册
Working Capital and Breakeven Workbook
- 融资分析工作手册
Funding Analysis Worksheets
- 企业战略规划模本
Strategic Business Plan Template

典型的模块三程序 Typical Module 3 Program



需完成的任务

Tasks to Be Completed

3.1 召开第二次战略规划会议

Hold the 2nd Strategic Planning Session

- 邀请客户----以信函/传真/电子邮件的方式确认这些安排。 请参见 [“第二次战略规划会议邀请函”](#)
Invite the client – use a letter/fax/email to confirm arrangements. Please refer to [“2nd Strategic Planning” Session Invitation](#)
- 安排地点----尽量使用一个中立性的场所，并保证会议地点没有干扰。
Arrange venue – try to use a neutral venue – there must to be no distractions.
- 餐饮安排----应准备上下午茶等。
Refreshments – morning / afternoon tea should be arranged.
- 设施----白板， 白板笔， 电脑(做 PowerPoint 演示之用)， 纸， 笔， 投影仪。 请参见 [“第二次战略规划会议准备清单。”](#)
Equipment – whiteboard , marker pens , computer (for PowerPoint presentations) , paper, pens, projector. Please refer to [“2nd Strategic Planning Session” Checklist](#)
- 确认你准备好了会议的议程。 参见 [“第二次战略规划会议议程。”](#) 至少在开会前两天把议程发给所有参会者。
Ensure that you have an agenda for the session. Refer to [“2nd Strategic Planning Session”](#)



Agenda. Send the agenda to all participants at least 2 days before the session.

- 第二次战略计划会议的时间为 3—4 个小时。
The 2nd Strategic Planning Session should take approximately 3-4 hours.

- 第二次战略计划会议旨在回顾企业从顾客和员工那里都获得了哪些有益的信息，它们对企业今后的发展有何意义等。从这个角度出发，可以起草企业的未来战略。这也需要明确企业所处的行业和竞争地位。
The purpose of the 2nd Strategic Planning Session is to review what has been learnt from customers and team members and apply this to how the business should move forward. From this the future strategy for the business can be drafted. This will require identifying the industries in which the business will operate and the competitive positioning.

3.2 完成行业竞争工作手册

Complete industry rivalry workbook

- 在第二次战略计划会议之前，与客户联系并要求他们参加会议时要准备他们所掌握的任何当前和未来的行业发展趋势资料。这些信息的可能来源包括行业协会，出版物和互联网等。

Prior to the 2nd Strategic Planning Session contact the client and ask them to bring to the session any information they can find on current and future trends in their industry. Possible sources of information include industry bodies, journals and the Internet.

- 应当重温波特(Porter)行业竞争模型。这里已为你提供出 PowerPoint 演示稿---请参见 [“波特\(PORTER\)行业竞争模型。”](#)

The Porter model of industry competition should be revisited. A PowerPoint presentation has been provided – please refer to [“Porter Industry Rivalry and Competition Model.”](#)

- 确保你有客户完成的 SNAQ 的行业竞争分析部分和 [“行业竞争工作手册”](#)。依据 SNAQ 提供的信息以及任何行业研究和讨论的信息，客户必须完成他们的行业竞争工作手册。

You will need to make sure that you have the clients completed Industry Rivalry Analysis sections of the SNAQ and the [“Industry Rivalry Workbook”](#). Based on the information provided in the SNAQ, any industry research and discussions, the client must complete their Industry Rivalry Workbook.

- 这种训练的目的在于了解客户所从事的行业有多大吸引力。这需要分析他们与顾客和供货商关系的



特点，潜在竞争者进入本行业的进入障碍，以及顾客可以选择的其它替代品。从这样的分析中可以发现本行业的盈利潜力，企业主可以决定是否还留在这个行业里。这是分析的一个非常重要的阶段，其结果将会影响到企业的未来战略。

The purpose of this exercise is to establish how attractive the industry in which the client operates in is. This will require an analysis of the nature of the relationship with customers and suppliers, the barriers to entry that prevent new competitors entering the industry and the substitutes that are available for your customers. From this analysis the profit potential of the industry can be established and the owners of the business can decide whether or not they should remain in that industry. This is a very important stage of the analysis and results will influence the future strategy of the business.

3.3 确定企业的目的，行业和所服务的市场

Determine the purpose of the business, the industries and segments that the business will operate in

- 对企业所处行业的特点做出结论。现在需要决定的是企业是否应继续从事这些行业。

Conclusions should be drawn about the nature of the industry(s) in which the business is operating. Decisions now need to be made regarding whether the business will continue to operate in those industries.

- 下列问题要同客户一起讨论:
The following questions must be raised with the client:

- ☞ 为什么要办企业？你的主要目的是赢利吗？还是满足市场需求？如果你的唯一目的是赢利，那么你就应该对经营企业的目的重新进行审视。

Why are you in business? Is your **primary purpose to make a profit**? Or is it to meet a market need? If your **sole purpose** is to make a profit you should not proceed;

- ☞ 你希望满足的那种市场需求已经由你的竞争对手之一做到了吗？如果是的话，你能做得更好或更廉价吗？你能够在他们现有的水平上再改进吗？

Is the market need you wish to meet already being serviced by one of your competitors? If yes, can you do it better or cheaper? Can you improve on what they are doing?

- 如果这种市场需求未被满足，你要满足这种需求的成本有多大？这样做值得吗？市场足够大吗？收益回报理想吗？

If the market need is not being service, how much will it cost for you to meet that need? Will it be worthwhile? Is the market big enough? Will the returns be worthwhile?

- 最后，你有完成这一战略的资源(资金，专业技术和能力)吗？

Finally, do you have the resources (funding, expertise, capabilities) to proceed with the strategy?

- 在你回答了上述所有问题之后，假设这是值得做的，企业此时应当可以确立一个“宗旨”，即，企业存在的真正目的。为企业总结一个企业宗旨。
Once you have answered all the questions above, providing that it is worthwhile, the business should establish a “statement of purpose,” a reason for being, the true purpose of the business. Summarise this in a purpose statement for the business.

3.4 明确你在所服务的市场中的竞争地位(战略)

Determine your competitive position (strategy) within those segments

- 一旦选定了行业，企业必须确定它将“如何”进行竞争。这是建立企业未来战略的第二部份。

Once the industry(s) have been selected, the business must decide “how” it will compete. This is the second part of establishing the future strategy of the business.

- 你需要回顾波特(PORTER)竞争定位模型。请参见 PowerPoint 演示稿 [“企业定位”](#)。

You will need to review again the Porter Model of Competitive Positioning. Please refer to the PowerPoint presentation [“Positioning Your Business.”](#)



- 企业主需要明确他们的未来战略----成本领先，或者是独特性。他们还需要明确是服务于大市场或专项市场。可以使用 [“企业定位”工作手册](#)来帮助你完成这项工作。

The business owners will need to identify their future strategy – low cost or differentiation. They will also need to establish if they will be serving a broad or niche market. To assist in this process you should use the [“Positioning Your Business” Workbook](#).



- 这本工作手册解释了竞争定位理论，引导企业所有者完成确定企业竞争地位的练习。

The workbook explains the theory of competitive positioning and guides the business owners through the exercise of determining their competitive position.

- 企业所有者阅读下列两本书也会很有收获:
It would also be useful for the business owners to read the following two books;

➔ **Michael E. Gerber** 著, 重温 E 时代的奇迹:
为什么大部分小企业未能成功以及应该怎么办? (Harperbusiness, 1995 版)

**Michael E. Gerber , The E Myth
Revisited: Why Most Small Businesses
Don't Work and What to Do About It
(Harperbusiness, 1995)**

➔ **Michael E.Porter** 著, 竞争战略:分析行业
和对手的技术(Free Press, 1998 版).

**Michael E. Porter , Competitive
Strategy: Techniques for Analysing
Industries and Competitors (Free
Press, 1998)。**

3.5 头脑风暴：企业如何能做到与众不同----确定 USPs

Brainstorm how the business will differentiate itself – determine the USPs

- 为了能集思广义找出 USPs， 需要召开一次 2 个小时的头脑风暴会。 企业所有者可以选择一些主要员工参加这次会议。

In order to brainstorm the USPs for the business, a 2-hour brainstorming session will need to be held. The owners may choose to have some key team members at this meeting.

- 会议应有议程，并至少在开会前两天发给所有与会者。 请参见 [“USP 头脑风暴会议程”](#) 模本和 [“USP 头脑风暴会”准备清单](#)。



An agenda should be set for the session and sent to all participants at least 2 days before the meeting. Please refer to [“USP Brainstorming Session Agenda” template](#) and the [“USP Brainstorming Session” Checklist](#).

- 企业的独特卖点 (USPs) 是企业与众不同的基础。USPs 可以是实物的，创造出来的或认知的。但是，其主要目的是让你的顾客(作为你的不同之处)了解， 然后， 在你做的任何事情中都反复强调这一点， 将其融汇到企业员工服务标准之中。请参见 [“USP 行动计划”](#)。



The Unique Selling Points (USPs) of the business will be the basis on which the business differentiates itself. USPs can be real, created or perceived. However the main objective is to communicate them to your customers (as your point of difference) and then reinforce this communication in everything you do i.e. through your Team Service Standards. Please refer to [“USP Action Plan.”](#)

- USP 必须是顾客所看重的东西----请参考前面的 CAS 和调查结果。

The USPs need to be something that the customers' value - refer back to the CAS and survey results.

- 企业需要发动群众来找出让顾客清楚明白地了解 UPSs 的方法。这是市场营销战略的组成部分之一。 USPs 是把你的企业与竞争对手区别开来的东西。他们决定了什么是真正重要的，并且可以对员工的努力和态度起到凝聚的作用。

The business will need to brainstorm ways in which the USPs can be articulated to the customers. This will form part of the Strategic Marketing Strategy. USPs are what differentiates your business from your competitors. They define what is really important and can be used as a way to focus the efforts and attitudes of the team.

3.6 建立一个企业收益模型

Draw up a revenue model for the business

- 企业的每个部门都需要准备财务预测。这些预测应当包括盈亏表，资产负债表，现金流量的预测。这些预测可以用 Excel 来做。请参见 [“预测样本”](#)。



Financial forecasts will need to be prepared for each Business Unit. The forecasts should include Profit and Loss, Balance Sheet and Cash Flow projections. These forecasts can be prepared in Excel. Please refer to the [“Forecast Examples.”](#)

- 你需要(为每个部门)做出下列预测:
You will need to establish the following (for each Business Unit):

- 销售额;
Sales \$;
- 销售组合;
Sales Mix;
- 毛盈利 (每个销售类别);
Gross Margin (per sales category);
- 直接变动费用;
Direct Variable Expenses;
- 固定费用 (分配的)
Fixed Expenses (allocated);
- 总资产额;
The total assets employed (\$); and
- 投资回报 (ROI).

The return on investment (ROI)。

- 确认你把与竞争战略有关的额外计划开支也有考虑在内。例如，你也许已经决定，为了加强“市场优势地位”，企业需要在市场开发活动上投入十万元资金。这种市场开发投资必须包含在企业模式中。

Ensure that you take into consideration any additional planned expenses relating to your identified competitive strategy. For example, you may have decided that in order to reinforce a “premium market position” the business needs to invest \$100, 000 in marketing activities. This marketing investment must be taken into consideration in the business model.

- 企业值得继续经营下去吗？企业赢利吗？企业的投资会有合理的回报吗？

Is it worthwhile for the business to proceed? Is the business profitable and will it return an adequate return on investment.

3.7 计算流动资金和融资需要

Calculate working capital and funding requirements

- 很多小企业所有者对流动资金的要求不了解。当企业开始增长时，这个问题就变得非常关键，因为，虽然企业销售得更多，盈利也更多，但是，企业需要额外的资金来应付存货和债务等问题就会经常被忽视，直到企业面临现金流危机。

Many small business owners have no idea of the working capital requirements. This becomes a critical issue when a business begins to grow because although the business may be making more sales and profit, the requirement for additional working capital to fund stock, debtors etc is often overlooked until the business faces a cash flow crisis.

- 这个阶段旨在培训企业所有者，使他们的企业不会陷入现金流危机。

The purpose of this stage is to educate the business owners so that their business does not get into a cash flow crisis.

- 第一步是计算企业的流动资金需求量。请参见[“计算你的流动资金需求量和盈亏平衡点”](#) PowerPoint 演示稿。

The first step is to calculate what the working capital requirements are of the business. Please refer to the PowerPoint presentation [“Calculating Your Working Capital Requirements and Breakeven.”](#)



- 第二，你需要计算出达到盈亏平衡点的销售额和作业量水平。请参见[“计算你的盈亏平衡点和盈亏平衡”](#)的 PowerPoint 演示稿。



Secondly , you will need to establish the break-even sales and volume activity levels. Please refer to the PowerPoint presentation [“Calculating Your Breakeven Points and Breakeven.”](#)

- 你需要让企业所有者完成 [“流动资金和盈亏平衡点工作手册”](#)。

You will need the business owners to work through the [“Working Capital and Breakeven Workbook.”](#)



- 一旦完成了流动资金需求量计算， 你需要进行融资分析， 确立融资渠道和方案。 此外，你还需要对任何外部融资渠道的安全性进行评估。 参见 [“融资分析工作手册”](#)。

Once you have calculated the working capital requirements you will need to undertake a funding analysis and establish funding sources and options. This will include identifying the security requirements for any required external funding. Refer to [“Funding Analysis Worksheets.”](#)



3.8 开始撰写企业战略规划

Start documenting the Strategic Business Plan

- 企业现在可以开始撰写正式的企业计划了。
The business is now ready to start documenting their formal Business Plan.

- 企业战略规划应当确定企业未来 2—3 年要达到的目标和实现这些目标的方法。你需要检查，企业的目标是否与企业所有者的个人目标相一致（参见前面完成的 SNAQ）。

The Strategic Business Plan should set out the objectives and ways in which the business will achieve its' objectives for the next 2-3 years. You will need to check that the business objectives relate back to the personal objectives of the owners (refer back to the completed SNAQ).

- 这里提供了“[企业战略规划模本](#)”。企业战略规划应当包括企业的下列主要领域：



“A Strategic Business Plan Template” has been provided. The Strategic Business Plan should cover the following primary areas of the business:

- 导言----企业综述
Introduction – Business Overview;
- 行业分析;
Industry Analysis;
- 企业战略和结构;
Business strategy and structure
- 产品和服务;

Products and Services;

- 市场分析;
Market Analysis;
- 市场计划;
Market Planning;
- 生产和运营计划;
Manufacturing and Operations Plan;
- 产品设计和开发计划;
Product Design and Development Plan;
- 人力资源及其结构;
Human Resources and Structure;
- 资金计划, 包括预测;
Financial Plan including projections; and
- 未来方向---前面的路。
Future Direction – The Way Ahead.

- 利用完成的 SNAQ 帮助你开始撰写企业战略计划。
Use information from the completed SNAQ to help you start documenting the Strategic Business Plan.

模块四:员工授权

Module 4: Team Empowerment

企业发展计划这一阶段的主要目标是激励员工。使所有员工拥护企业的远景和未来目标，并有机会参与是非常关键的。在这个模块里，员工将设计自己的服务标准并加强其对客户服务的重视。

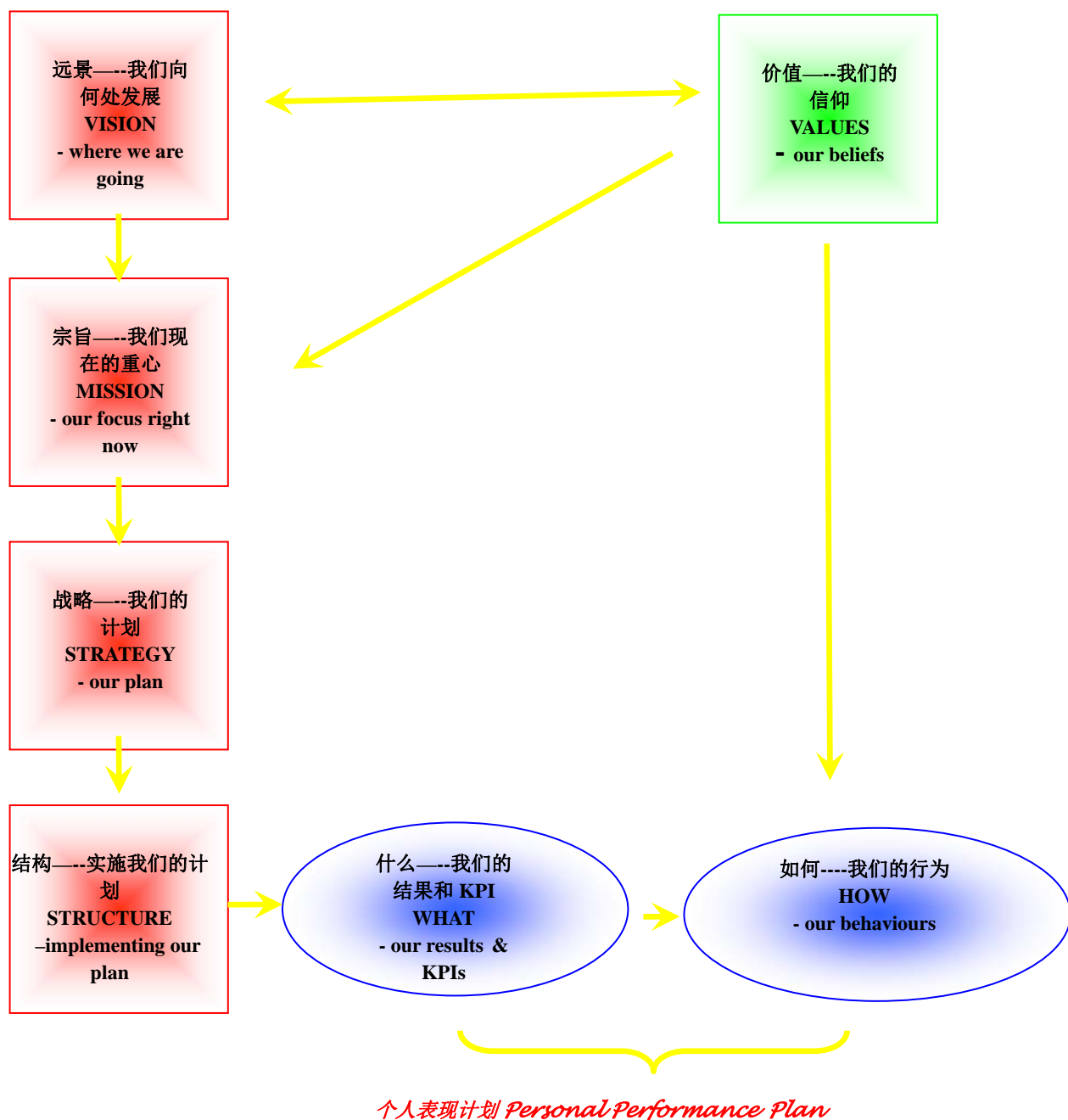
The primary objective of this stage of the business development program is to motivate the team members. It is essential that all team members become aligned to the vision and future goals of the business and have the opportunity to participate. This module will see team members designing their own service standards and renewing their focus on customer service!



愉快

$$= \text{生产力} + \text{客户服务} = \text{利润}$$
$$\text{Fun} = \text{Productivity} + \text{Customer Service} = \text{Profit!}$$


对企业业绩进行管理 Managing Organisational Performance



主要学习目标


Key Learning Objectives


下面的单子详细列举了模块四----员工授权部分主要学习目标:

The following list details some of the Key Learning Objectives of Module 4 – Team Empowerment:

- 了解目前员工的激励水平和开心程度， 努力做到员工的充分授权；
To understand the current level of motivation and team happiness, and work towards empowering team members;
- 衡量企业对客户服务的承诺， 并建立一种内部和外部的客户服务焦点；
To measure the organisations commitment to customers and develop an internal and external customer service focus;
- 减少对客户漠不关心的现象；
To reduce levels of perceived indifference;
- 运用企业内部所有的沟通渠道；
To engage all communication channels within the business;
- 为所有的员工创造学习环境；
To create a learning environment for all team members;
- 理解一体化人力资源战略的重要性；
To understand the importance of an integrated human resource strategy;
- 理解管理/领导风格对员工的影响；
To understand managerial / leadership styles its' impact on team members; and
- 建立员工服务标准和主要业绩指标。
To develop team service standards and key performance indicators.

工具 Tools

下列工具可以帮助你进行工作。 这些工具与“需完成的任务”部分相互参照 (以  表示)。

The following Tools have been provided to assist you. These Tools are cross-referenced throughout the “Tasks to Be Completed” section (denoted by .

第二次员工会议邀请函模本

[Invitation to Team Meeting #2 Template](#)

员工最新情况通报会议程

[Team Update Meeting Agenda](#)

员工最新情况通报 PowerPoint 演示

[Team Update PowerPoint Presentation](#)

员工咨询会资源文件包 (包括员工邀请函, 议程样本, 会议准备清单, 主持人手册和会议报告模本)

[Team Advisory Session Resource Pack \(includes team member invites, sample agenda, session checklist, facilitator guide and report template\)](#)

“优质服务----争创第一”资源文件包 (包括讲座邀请函, PowerPoint 演示稿, 员工工作手册, 主持人手册和讲座准备清单)

[“Exceptional Service – Leading The Pack” Resource Pack \(includes workshop invites, PowerPoint presentation, team member workbook, facilitator guide and seminar checklist\)](#)

管理层/领导态度回顾和管理行动计划

[Managerial / Leader Attitudes Review and Management Action Plan](#)

有效的行政管理者技能--- Robert L Katz

[Skills of an Effective Administrator – Robert L Katz](#)

招聘战略诊断

[Recruitment Strategy Audit](#)

我的招聘战略行动计划

[My Recruitment Strategy Action Plan](#)

招聘文章选编

[Selected Recruitment Articles](#)

招聘工具箱

Recruitment Toolbox

培训战略诊断

Training Strategy Audit

培训战略行动计划

The Training Strategy Action Plan

培训反馈表

Training Feedback Form

培训文章选编

Selected Training Articles

绩效管理诊断

Performance Management Audit

绩效管理行动计划

Performance Management Action Plan

绩效管理文章选编

Selected Performance Management Articles

绩效管理工具箱

Performance Management Toolbox

奖励制度诊断

Rewards System Audit

奖励制度行动计划

Rewards System Action Plan

奖励制度文章选编

Selected Rewards System Articles

员工冠军和欢乐制度 (包括问卷调查和反馈制度)

Team Champion and Happiness System (including surveys and feedback system)

在企业里实施一个创意的计划

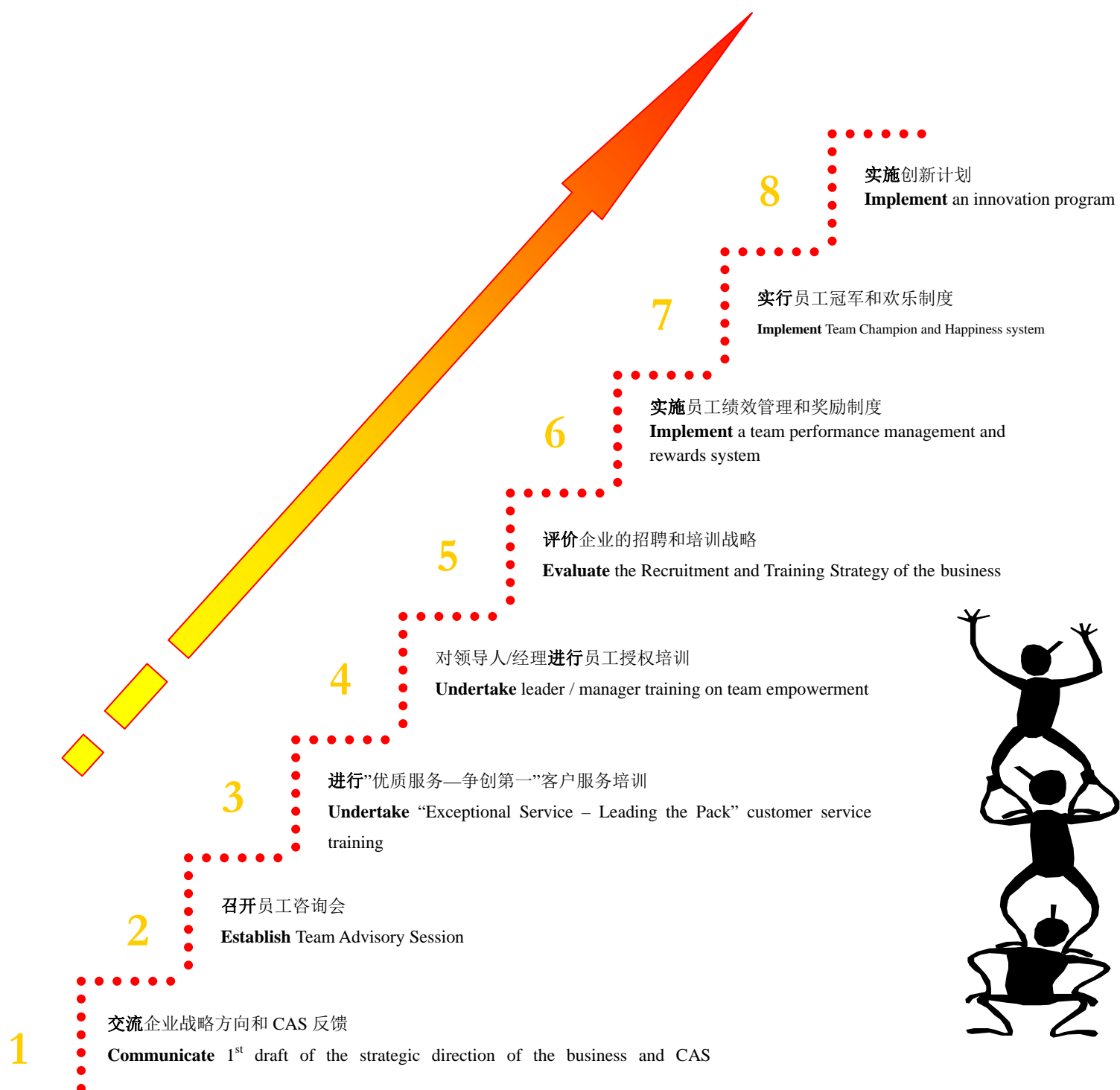
Implementing An Ideas Program Into Your Business

“我们的美妙创意”杂志

Our Great Ideas Journal

典型的模块四程序

Typical Module 4 Program



需完成的任务

Tasks to Be Completed

4.1 召开员工会议，交流企业的战略方向初稿和 CAS 结果

Hold team meeting to communicate 1st draft of strategic direction of business and CAS results

- 在本阶段，得到员工对本项目的参与承诺是非常重要的。

It is very important during this stage that you gain the commitment of the team members to the program.

- 这次员工会议的目的是使员工了解 BPIP 的进展，并使他们感觉到他们的参与。

The purpose of this team meeting is to keep the team members informed of the BPIP progress and make them feel consulted.

- 员工应当得到企业所有者或总经理的正式邀请函参加该会。请参见 [“第二次员工会议邀请信”模板](#)。

Team members should be formally invited to the meeting by the Owner / Managing Director via a letter. Please refer to [“Invitation to Team Meeting #2” template](#)



- 确认你准备了会议的议程---请参见 [“员工情况通报会”议程](#)

Ensure that you have a meeting agenda – please refer to [“Team Update Meeting” Agenda](#)



- 在这次会上，员工应该得到 CAS，顾客问卷调查，员工问卷调查和竞争战略结论的反馈信息。如果可能，应当将提交给企业所有人的 CAS 报告也给一份给员工。如果做不到，也应该给他们提供一份主要发现和建议的概要说明 (这是最低要求)。请参见 [“员工情况通报会 PowerPoint 演示。”](#)



During this update, team members should be provided with feedback in respect of the CAS, Customer Survey, Team Survey and competitive strategy conclusions. If possible, team members should be provided with a copy of the full CAS report that was given to the business owners. If this is not possible they should be given a summary of the key findings and recommendations (as a minimum). Please refer to [“Team Update PowerPoint Presentation.”](#)

- 在提供 CAS 反馈时，要确保员工得到正面的反馈和具有建设性的改进要点。
Ensure when delivering the CAS feedback that team members are given both positive feedback and **constructive points of improvement.**

4.2 召开员工咨询会(TAS)

Establish a Team Advisory Session (TAS)

- 员工咨询会旨在征询员工对产品，市场开发，客户服务，管理和文化等方面的看法。

The team advisory session seeks team member feedback in respect of products, marketing, customer service, management and culture.

- TAS 的理想规模是 10 到 12 人之间。建议会议由一个中立方(咨询顾问)来主持。

The ideal group size for the TAS is between 10 and 12 team members. It is recommended that a neutral party (consultant) facilitate the session.

- 邀请被选中的员工参加 TAS----请参见 [“员工咨询会资源文件包”](#)中的[“员工邀请函”](#)。

Invite the selected team members to a TAS – please refer to [“Team Member Invite”](#) in the [“Team Advisory Session Resource Pack.”](#)



- 开会前，会议议程要发给员工。请参见 [“员工咨询会资源文件包”](#)中的[“TAS 议程样本”](#)。

Prior to the session, the agenda should be circulated to the team members. Please refer to [“TAS Sample Agenda”](#) in the [“Team Advisory Session Resource Pack.”](#)



- 需要安排后勤事宜----请参见[“TAS 准备清单”](#)。Logistics need to be arranged – please refer to the [“TAS Checklist.”](#)



- TAS 可以录音。这样可以使企业所有人在会后收听会议情况。我们的经验表明，录音并不影响员

工参与的程度。

The TAS can be audio taped. This allows the business owners to listen to the session afterwards. Our experience is that audio taping the sessions **does not affect** the level of participation.

- 可以将员工的反馈集中控制在某个范围的问题中，但是， 会议的目的是发现那些他们真正喜欢和那些他们希望企业改进的地方(包括， 如何改进的看法)。 员工主要要进行自己对企业的 SWOT 分析，并提出建议。

Team feedback can be sort on a range of issues but the aim is to find out those things about your business that they really like and those areas where they would like to see changes (including what those changes would be). The team members in essence conduct their own SWOT analysis and recommendations for the business

4.3 进行“优质服务----争创第一”客户服务培训

Undertake “Exceptional Service – Leading the Pack” customer service training.

- 这种培训的目的是使员工思考他们如何来提供“优质服务”。培训大约进行 3—4 小时。这种培训很具激励性，将产生被授权的，有活力的员工

The objective of the workshop is to get team members thinking about ways in which they can provide “exceptional service.” The session takes approximately 3-4 hours. The workshop is motivational and will result in empowered, energised team members.

- 要正式邀请每一位员工---参见你的培训资源包中的 [“争创第一”培训邀请函](#)。

Formally invite each team member – refer to the [“Invitation to Leading The Pack”](#) in your training resource pack.



- 安排地点（尽量使用中立性场所）和准备餐饮（上下茶）。

Arrange venue (try to use a neutral venue) and refreshments (morning or afternoon tea).

- 设施---白板，白板笔，电脑（作 PowerPoint 演示之用），纸，笔，投影仪。请参见你的培训资源包中的 [“培训准备清单”](#)。

Equipment – whiteboard, marker pens, computer (for PowerPoint presentations), paper, pens, projector. Please refer to the [“Seminar Checklist”](#) included in your training resource pack.



- 在培训中，将通过演示来为员工提供指导。培训

议题包括优质服务， 独特卖点， 承诺和态度。

During the sessions team members will be guided through the presentation. Topics covered include exceptional service, unique selling propositions, guarantees, and attitude.

- 本培训旨在培训为本项目中稍后会建立的员工服务标准和主要业绩指标制定一个激励的基础。
The training is designed to be a “teaser” and forms the stimulation basis for the development of Team Service Standards and Key Performance Indicators later in the program.

4.4 进行领导/经理的员工授权培训

Undertake Leader / Manager training on team empowerment

- 企业所有者和领导人需要了解自己的领导风格及其这些风格对企业和员工的影响，这是很重要的。
It is important that the owners and leaders of the business gain an understanding of their own leadership styles and how this impacts on their business and team members.

- 这一步旨在帮助企业所有者和经理用自我评估练习的方法审视自己的管理风格。
The purpose of this step is to assist the owners and managers to examine their own styles using self-evaluation exercises.

- 所有的企业领导人和经理都应当完成 X 理论/Y 理论的练习----参见 [“领导者/管理层态度回顾和行动计划”](#)。

All business leaders and managers should complete the Theory X / Theory Y exercise – refer to [“Leader/ Management Attitudes Review and Action Plan”](#)

- 重温“一分钟经理”的原则---一分钟目标，赞扬和惩戒。建议企业所有者阅读 [“一分钟经理”](#) 和 [“高效行政管理者的技能”](#)。

Review of the principles of the “One Minute Manager” – one-minute goals, praising and reprimands. All owners of the business must read [“The One Minute Manager”](#) and [“Skills of an Effective Administrator”](#)

- 当领导人和经理完成了 X 理论/Y 理论的练习后，对所提出的结论进行讨论，特别是在“懒惰的约



翰”方面的结论。

Once the leaders and managers have completed the Theory X / Theory Y exercise discuss their conclusions, particularly in respect of the “Lazy John” exercise.



- 每位经理/领导人都必须就如何改变自己的管理风格制定一个行动计划。 请参见 [“领导人/管理层态度回顾和行动计划”](#)。

Each manager / leader must develop an Action Plan for the things they are going to change about their management. Please refer to [“Leader/ Management Attitudes Review and Action Plan”](#)

- 作为行动计划的一个部分， 每位经理/领导人应当找出他们希望得到培训的三个领域。

As part of their action plan each manager / leader should identify 3 areas in which they wish to undertake training.

4.5 评估企业的招聘和培训战略

Evaluate the Recruitment and Training Strategy of the business

- 企业的招聘和培训战略要与企业宗旨，远景和目标相一致，这是非常重要的。

It is critical that the recruitment and training strategy of the business is aligned to the business mission, vision and objectives.

- 首先，你需要让企业老板完成招聘诊断，然后与他们一起制定招聘战略行动计划。请参见 [“招聘战略诊断”](#) 和 [“我的招聘战略行动计划。”](#)

First you will need the business owners to do the Recruitment Audit and then together develop a Recruitment Strategy Action Plan. Please refer to [“Recruitment Strategy Audit”](#) and [“My Recruitment Strategy Action Plan.”](#)



- 有些关于招聘的文章，你应该让企业所有者们阅读---参见 [“招聘文章选编”](#)。

These are a selection of articles on recruitment that you should get the owners of the business to read – please refer to [“Selected Recruitment Articles.”](#)



- 企业所有者制定出招聘战略行动计划后，这些政策和程序需要立即在企业中实施。[“招聘工具箱”](#) 提供了一批包括面试，录用通知和入职培训准备清单在内的模本。

Once the business owners have developed the Recruitment Strategy Action Plan policies and procedures need to be implemented into the business. [“Recruitment Toolbox”](#) provides a selection of templates including interviewing, offer of employment and induction checklists.





- 其次，企业必须进行培训战略诊断和制定培训行动计划。请参见 [“培训战略诊断”](#) 和 [“培训行动计划”](#)。还有一些关于培训重要性的文章，请让企业所有者阅读---见 [“培训文章选编”](#)。

Secondly, the business must undertake a Training Strategy Audit and develop a Training Action Plan. Please refer to [“Training Strategy Audit”](#) and [“The Training Action Plan.”](#) There is also a selection of articles on the importance of training. Please get the business owners to read these – refer to [“Selected Training Articles.”](#)

- 已完成的 SNAQ 中的人力资源战略部分会有助于这部分计划的实施。

The completed Human Resource Strategy section of the SNAQ will be of assistance during this module.

4.6 执行与企业远景、宗旨相一致的员工绩效管理与奖励制度 To implement a team performance management and rewards system that supports the Vision and Mission

- 将员工绩效管理和奖励制度与企业的远景与宗旨相结合，是十分必要的。

It is critical that the team performance management and rewards system of the business is aligned to the business mission, vision and objectives.

- 首先，需要企业所有人完成“[绩效管理诊断](#)”，然后完成“[绩效管理行动计划](#)”。请参照“[绩效管理诊断](#)”与“[绩效管理行动计划](#)”。

First you will need the business owners to do the “[Performance Management Audit](#)” and then together develop a “[Performance Management Action Plan.](#)” Please refer to “[Performance Management Audit](#)” and “[My Performance Management Action Plan.](#)”

- 我们准备有一些与绩效管理有关的文章，你需要将其提供给企业所有人阅读—请参见“[绩效管理文章选读](#)”。

These are a selection of articles on performance management that you should get the owners of the business to read – please refer to “[Selected Performance Management Articles.](#)”

- 当企业所有人制定了绩效管理行动计划政策后，需要在企业内执行该计划。在“[绩效管理工具箱](#)”中提供有一些绩效评估与职位描述的相关模板。

Once the business owners have developed the Performance Management Action Plan policies and procedures need to be implemented into the business. “[Performance Management Toolbox](#)” provides a selection of templates including performance appraisals and role



descriptions.

- 其次，企业必须进行“奖励制度诊断”，并制定出“奖励制度行动计划”。请参见“奖励制度诊断”，与“奖励制度行动计划”。

Secondly, the business must undertake a “Rewards System Audit” and develop a “Rewards System Action Plan.” Please refer to “Rewards System Audit” and “Rewards System” Action Plan. There is also a selection of articles on rewards systems. Please get the business owners to read these – refer to “Selected Rewards System Articles.”



4.7 实行员工冠军和开心体系

Implement Team Champion and Happiness system

- 团队冠军和欢乐制度是用来强化到目前为止所学的东西。它通过褒扬员工的努力来支持一种积极活跃的文化。它是一种增强团队建设的工具。

The team champion and happiness system is designed to reinforce everything that has been learnt. It supports the positive vibrant culture of the business while acknowledging the efforts of team members. It is a motivational team-building tool.

- 我们建议你定期地采用“[员工冠军和快乐](#)”体系对员工进行问卷调查。这一体系包括：

We recommend that you regularly survey team members using the [“Team Champion and Happiness”](#) system provided. The system comprises of:

- 问卷调查;
Surveys;
- 分析工具;
Analysis tool; and
- 反馈体系.
Feedback system.

- 我们建议你每两周实施一次员工冠军和快乐体系。
We recommend that you implement the Team Champion and Happiness system on a fortnightly basis.

- 你应当把员工召集在一起,正式宣布员工“冠军”。有些企业还发给冠军团队吉祥物,由他们保持到下一个冠军的产生。还可以给冠军发一份小礼物,作为你对他们努力的赞赏,例如电影票。

You should formally acknowledge the Team



Champion by bringing together team members for the “Champion” announcement. Some businesses have also implemented a team mascot that is given to the Team Champion until the next champion is appointed. You may also want to give the Team Champion a small gift as a token of your appreciation for their efforts e.g. movie tickets

- 这一体系是一个极好的团队激励工具。它也为管理层提供了关于团队忠诚度的重要信息----请参见 [“员工冠军和快乐体系”](#)。

The system is a great team motivation tool. It also provides the management team with vital information on team morale – please refer to [“Team Champion and Happiness System.”](#)



4.8 在企业里实施创新和反馈与持续改善计划

Implement an innovation and continuous improvement program into the business

- 能够长期取得成功的企业是那些善于获取和实施员工所作出的创新的企业。它们是一些在每件事情上都寻求反馈与持续改善的企业。

The most successful long-term businesses are the ones that capture and implement the innovations of their team members. They are the organisations that seek continuous improvement in everything that they do.

- 在项目的这个阶段，需要企业所有者在企业里实施一种能获取员工创新的制度，一种将不断改进成为企业文化核心部分的制度。

During this stage of the program you will be asking the owners of the business to implement a system into their business to capture their team member innovations and making continuous improvement a core part of their business culture.

- 实现这一目标的一个方法是在企业的每个职能领域实行“美妙创意期刊”。鼓励员工们在该杂志上发表他们的想法。每个月，由一位高级经理审阅该杂志，决定哪些主意可以在企业里采用。

One way to achieve this is to implement an “Ideas Journal” into each functional area of the business. Team Members are encouraged to write their ideas in the journal. Every month a Senior Manager reviews the journal and decides which ideas should be implemented into the business.

- 当员工的观点被采纳时，他们应当给予奖励和公布。奖励并不一定需要很贵的东西。

When an idea is implemented the team members should be rewarded and recognised. The reward

does not have to be of significant monetary value.

- 我们提供了一份 PowerPoint 演示稿，你应当将其介绍给企业所有者—“[在企业内实行创意计划](#)”。企业所有者在看完演示之后,应当在企业里实行“[美妙创意期刊](#)”的做法。

We have provided a PowerPoint presentation that you should present to the business owners – [“Implementing An Ideas Program Into Your Business”](#) Once the owners have been through the presentation they should implement [“A Great Ideas Journal”](#) into their business.



模块五:市场营销战略规划 Module 5: Strategic Marketing Plan

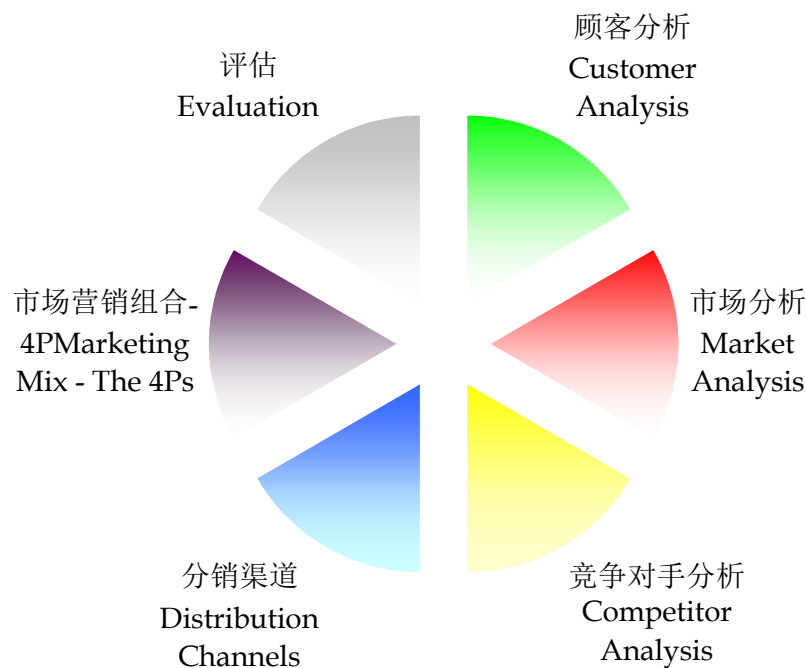
概述 Overview

市场营销战略规划应当以寻求扩大企业现有市场机会为目标;明确和评估可以推向市场的新产品和服务;评估企业现有的增加销售的能力;找出新的市场机会;探讨并制定进入新市场或扩展现有市场的战略,并制定计划来执行和控制未来的市场活动。

The Strategic Marketing Plan should aim to identify opportunities for the business to expand their existing markets; identify and evaluate new products and services that could be introduced into the market; assess the business' existing capability to increase sales; identify new market opportunities; explore and develop strategies for either entering new markets or expanding the existing markets and present a plan for the implementation and control of future marketing activities.

市场营销战略规划所需的某些信息可以在战略需求分析问卷(在模块一----“了解你的企业”里用过) 中找到。

Some of the information required for the Strategic Marketing Plan will be found in the **Strategic Needs Analysis questionnaire** (used in Module 1 – Understanding What Business You Are In).




主要学习目标 Key Learning Objectives


下列清单详细列举了模块五----“市场营销战略计划”的主要学习目标的内容:

The following list details some of the Key Learning Objectives of Module 5 – Strategic Marketing Plan:

- 将现有客户按市场和等级分类;
Categorise current clients into markets and classifications;
- 确定 “A” 类客户和未来客户选择标准;
Determine “A” class clients and the future client selection criteria;
- 重新评估产品和服务种类， 分析它们如何满足市场需求的方式;
Review product and service lines and analyse the way in which they assimilate to the needs of the market;
- 正式确定价格定位和战略;
To formalise the pricing positioning and strategy;
- 就如何将承诺融入到销售程序中去，展开头脑风暴;
To brainstorm the use of a guarantees as part of the sales process;
- 重新评估现行市场战略的有效性， 制定行动计划来执行市场战略;
To review the effectiveness of current marketing strategies and develop an action plan for impending marketing strategies;
- 重新评估现行销售战略， 提出一个未来市场营销和促销活动的时间表;
To review the current sales strategies and develop a marketing and promotional calendar for future events; and
- 制定企业市场营销战略计划。
To develop the Strategic Marketing Plan for the business.

工具 Tools

下列工具可以用来帮助你工作。这些工具与“需完成的任务”部分相互参照 (以  表示):

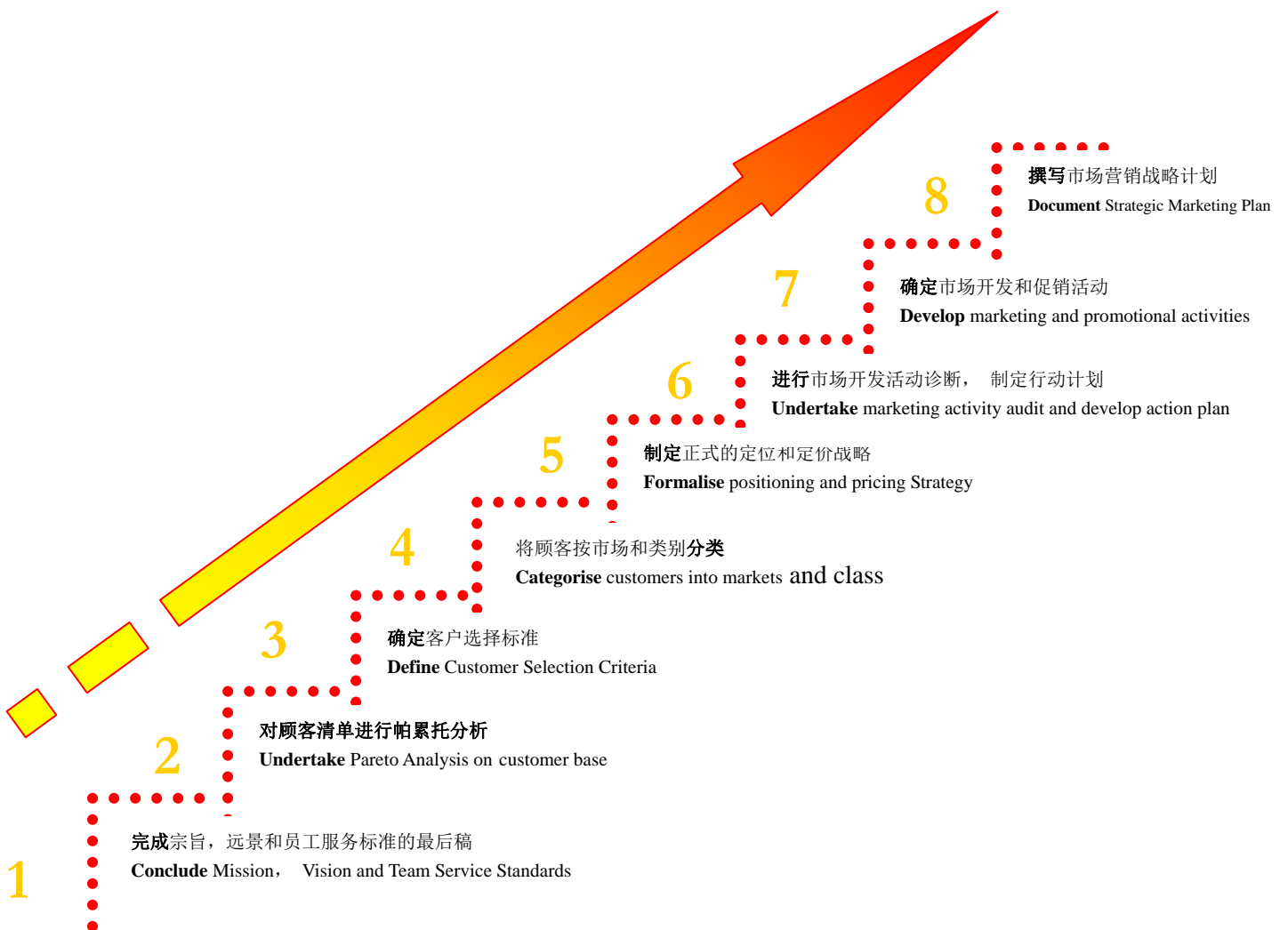
The following Tools have been provided to assist you. These Tools are cross-referenced throughout the “Tasks to Be Completed” section (denoted by ):

- 第三次员工会议邀请函
Invitation to Team Meeting # 3
- 第三次员工会议议程模本
3rd Team Meeting Agenda Template
- 第三次员工会议 PowerPoint 演示稿
3rd Team Meeting PowerPoint Presentation
- 第三次员工会议准备清单
3rd Team Meeting Checklist
- Pareto 分析工作手册
Pareto Analysis Workbook
- “我们如何为您提供更好的服务”函
“How We Can Serve You Better” Letter
- 第四次员工会议邀请函
Invitation to Team Meeting # 4
- 第四次员工会议准备清单
4th Team Meeting Checklist
- 第四次员工会议议程模本
4th Team Meeting Agenda Template
- “客户选择标准----我们的”A”类顾客 “PowerPoint 演示稿
“Customer Selection Criteria – Our “A” Class Customer” PowerPoint Presentation

- “我们的客户选择标准” 工作手册
“Our Customer Selection Criteria” Worksheet
- SNAQ 中的“顾客细分”部分
Customer Segmentation” section of the SNAQ
- 顾客沟通分析工作表
Customer Communication Analysis Worksheets
- 利润潜力表格
Profit Possibilities Spreadsheet
- 折扣表
Discounting Tables
- “承诺的威力” 文章
“The Power of Guarantees” Article
- 市场营销活动分析
Marketing Activity Analysis
- 市场营销活动行动计划
Marketing Activity Action Plan
- 市场营销和促销宣传日历
Marketing and Promotional Campaign Calender
- 市场营销战略计划模本
Strategic Marketing Plan Template

典型的模块五程序

Typical Module 5 Program



需完成的任务

Tasks to Be Completed

5.1 召开员工会议，最后确定企业宗旨、远景和员工服务标准 Hold a team meeting to conclude the Mission, Vision and Team Service Standards of the business

- 邀请员工参加第三次员工会议。请参见 [“第三次员工会议邀请函。”](#)



Invite the team members to their 3rd meeting. Please refer to [“Invitation to Team Meeting #3.”](#)

- 确认你准备好了会议议程----请参见 [“第三次员工会议议程”模本。](#) 这次会议应包括下列内容:



Ensure that you have an agenda for the meeting – please refer to [“3rd Team Meeting Agenda” Template.](#) The meeting should cover the following:

- 审阅企业宗旨和远景，并形成一致意见;
Review and agreement of Mission and Vision;
- 再次回顾“优质服务----争创第一”培训的结果;
Review of the outcomes of the “Exceptional Service – Leading The Pack” workshop(s);
- 回顾员工服务标准，并达成一致看法;
Review and agreement of the Team Service Standards; and
- 作出下一步计划的大纲。
Outline of the program going forward.

- 这里已提供出 PowerPoint 演示稿，[“第三次员工会议 PowerPoint 演示稿。”](#)

A PowerPoint presentation has been provided,
[“3rd Team Meeting PowerPoint Presentation”](#)



- 最好使会议在一种轻松的环境下进行。我们建议会议在星期五下午举行，并准备一些点心饮料。请参见 [“第三次员工会议准备清单。”](#)

Ideally, this meeting should have a social element to it. We suggest that it is held on a Friday afternoon and that light refreshments are arranged. Please refer to [“3rd Team Meeting Checklist”](#)



- 这次会议是经营业绩改善项目的一个重要里程碑，应当将其办成一次庆祝活动。企业要向员工作出的贡献表示感谢。

This meeting marks an important milestone in the Business Performance Improvement Program and should be treated as a celebration. It is essential that team members are thanked for their contributions.

5.2 对现有顾客进行帕累托分析， 确定哪些客户企业应该放弃

Conduct Pareto Analysis on current customer base and decide which clients you should no longer serve

- 你需要与客户一起重温帕累托原则----请参见 [“帕累托分析工作手册”](#)



You will need to review the Pareto Principle with the clients – please refer to [“Pareto Analysis Workbook”](#)

- 完成这一练习的方法会因企业类型的不同而有所区别。但是， 你应该完成下列步骤----参见 [“帕累托分析工作手册”](#):



The approach to this exercise will differ according to the type of business. However generally you will need to go through the following steps – refer to [“Pareto Analysis Workbook”](#):

- 召开员工会议， 征求他们对企业应放弃的顾客的看法;
Meet with your team and canvass their opinions on the customers they believe the business should no longer serve;
- 确定你的顾客类别---从“A” 到 “D”， 按此对现有客户进行分类;
Define your customer categories – “A” to “D” and categorise your customers;
- 按照客户为企业带来的收益， 对其进行分析。 把“帕累托原则”应用到客户收益分析中， 你应当发现 “D” 类顾客的共有特点;
Analyse your clients according to the revenue they generate. Applying the “Pareto Principle” to the client revenue analysis and you should begin to see a

pattern emerging for the “D” class customers;

- ➡ 通过完成“客户平均利润”来确认你的结论；

Confirm your conclusions by undertaking a “profit per customer” analysis;

- ➡ 确认你认为应当放弃的顾客，并考虑这样做的后果；

Identify those customers you believe should go and think through the consequences;

- ➡ 向“D”类顾客发送“我们如何为您提供更好的服务”函。

Send the **“How We Can Serve You Better” Letter** to the “D” class customers.



- 如需要更多的信息，请参见“**帕累托分析工作手册**”。

Please refer to the **“Pareto Analysis Workbook”** for further information

5.3 确定“A”类顾客和未来顾客选择标准

Define the “A” class customer and the future customer selection criteria

- 现在你需要让企业正式确定其顾客选择标准，并将这些标准溶入到企业的系统中。

Now you need to get the business to formalise its' customer selection criteria and integrate the criteria into the systems of the business.

- 我们建议让员工参与这个过程。
We suggest that you involve the team in this process.

- 安排一次员工会议—请参见 [“第四次员工会议邀请。”](#)

Arrange a team meeting – please refer to [“Invitation to Team Meeting #4.”](#)

- 会议应开 2 个小时。请参见 [“第四次员工会议准备清单。”](#)

You should allow 2 hours for the meeting. Please refer to [“4th Team Meeting Checklist”](#)

- 确认你准备了这次会议的议程---请参见 [“第四次员工会议议程”模本。](#)

Ensure that you have an agenda for the meeting – please refer to [“4th Team Meeting Agenda” Template.](#)

- 将这次会议办成一个头脑风暴会。这里为你提供了 PowerPoint 演示稿---请参见 [“顾客选择标准—我们的”A’类顾客” PowerPoint 演示稿。](#)

The meeting should be facilitated as a brainstorming session. A PowerPoint presentation has been provided to assist you –



please refer to **“Customer Selection Criteria – Our “A” Class Customer” PowerPoint Presentation.**



- 你还需要给每一位与会者一份 **“我们的顾客选择标准”工作手册。**

You will also need to give each participant **“Our Customer Selection Criteria” Worksheet.**

- 一旦选择标准确定后， 你需要与员工一起头脑风暴， 找出将这些标准溶入到相关制度---如销售程序---的办法。 将这些标准纳入到企业体系中是非常重要的。

Once the selection criteria have been established you will need to brainstorm with the team to establish how the selection criteria can be integrated into the applicable business systems such as the sales process. It is essential to build the criteria into the business systems.

5.4 将顾客按照市场归类， 然后再(按顾客选择标准)按等级进行分类 Categorise all customers into markets and then classification (according to client selection criteria)

- 这个步骤是要确定目标顾客， 再以此为基础确定企业的目标市场；

This step is about defining the target customer segments so that the business can profile your target market.

- 目标市场的确定可以使企业根据其来量身定做市场活动， 从而提高其市场营销， 促销和综合宣传的有效性。

Profiling the target market will allow the business to tailor its' marketing activities and therefore increase the effectiveness of its' marketing, promotions and general communication.

- 为了真正了解顾客， 企业需要明确其目标市场的人口分布和心理构成。 [SNAQ 的“顾客分割”部分](#)已提供了一些这方面的信息。

In order to truly understand its' customers the business will need to define the demographics and psychographics of their target market. Some of this information will already have been established in the [“Customer Segmentation” section of the SNAQ.](#)



- 参照 SNAQ， 明确是否还需要更多的信息。 如果需要， 则要求企业所有者组织调研。

Refer to the SNAQ and establish whether further information is required. If it is allocate research activities to the business owners.

- 当你认为企业准确地将顾客分类后， 需要找到与这些顾客进行接触的最佳途径。 这样做， 可以使企业选择最佳的宣传渠道和媒体。

Once you are satisfied that the business has

accurately profiled its' customer groups they will need to establish the best way to reach these customer groups. This will enable them to identify suitable communication channels and mediums.

- 宣传渠道应当建立在每类顾客的习惯、喜好和厌恶的基础之上，例如，有些顾客一定会浏览某些杂志和期刊，而有些则肯定不会。通过确认被选中的顾客的“习惯”，你可以更加准确地有针对性地展开宣传。参见 [“顾客宣传分析工作手册”](#)。Communication channels should be based on the habits, likes and dislikes of each segment e.g. some segments will read certain magazines and journals while others will not. By establishing the “habits” of the selected customers you can more accurately target your communications. Refer to [“Customer Communication Analysis Worksheets.”](#)



5.5 正式确定定位和定价战略

Formalise the positioning and pricing strategy

- 这部分计划需要企业正式确定其定位和定价战略。
This Module requires the business to formalise the positioning and pricing strategy of the business.

- 定位战略已经在本项目的前面部分明确了(请参见模块三第四步: 确定你的竞争地位(战略))。但是, 我们现在要确保已采取的定价战略与这一定位战略相一致。

The positioning strategy will already have been defined earlier in the program (please refer back to *Module 3.4: Determine your competitive position (strategy) within those segments*). However now we must ensure that the adopted pricing strategy is aligned to this positioning strategy.

- 要对企业所有者进行减价影响的培训。为此, 我们建议你使用 [“利润潜力表格”](#)软件和[“折扣表”](#)。这两份材料都已提供给你了。

The business owners will need to be educated on the impact of discounting. In order to do this we suggest you use the [“Profit Possibilities Spreadsheet”](#) software and the [“Discounting Tables.”](#) Both of these resources have been supplied.



- 在可能的情况下, 应当鼓励企业所有者实行提价。提价对盈利性和企业价值的影响可以通过 [“利润潜力表格”](#)得到显示。

Where possible the business owners should be encouraged to implement a price increase. The impact of this price increase on the profitability and value of the business should be demonstrated using the [“Profit Possibilities](#)



Spreadsheet.”

- 企业还必须考虑采取承诺政策。这一战略在有效地消除”顾客”的购买风险方面非常有力。企业所有者应当阅读一下 [“承诺的威力”一文](#)。



The business must also consider the introduction of a guarantee. This strategy is very powerful when it is used to effectively remove the risk of the purchase (for the customer). The business owners should read [“The Power of Guarantees” Article](#).

- 与企业所有者一起展开头脑风暴，找出一种有效的承诺方式。参照 CAS 报告和顾客调查问卷的反馈来明确顾客所认为的”风险”。

Brainstorm with the business owners to establish a powerful guarantee. Refer back to the CAS Report and customer survey feedback to identify “the perceived risks” from the customer’ perspective.

5.6 进行市场营销活动诊断和制定一个行动计划

Undertake marketing activity audit and develop an action plan

- 这个步骤的目的是重新审视企业现有市场营销活动的有效性。

The purpose of this step is to review the effectiveness of the current marketing activities being undertaken by the business.

- 让企业所有者完成“[市场营销活动分析](#)”。这可以使你了解企业现有市场营销活动的水平。这里还提供了“[市场营销活动](#)”行动计划。

Ask the owners to complete the “[Marketing Activity Analysis](#).” This will give you some indication of the level of sophistication of the business’ current marketing activity. A “[Marketing Activity](#)” [Action Plan](#) has also been provided.

- 要求企业所有者向你提供他们认为能够合理解释企业现有市场营销活动的信息(或者是相反的信息)。关键是要衡量市场营销活动的效果(而且通常是相对容易的!)

Ask the business owners to provide you with any information they have that would justify (or otherwise) their current marketing activities. Measuring results is critical for marketing activities (*and generally relatively easy!*).

- 你需要明确现有的市场营销活动是否与企业的未来战略相一致。

You will need to establish whether the current marketing activities are appropriate for the future strategy.

- 比较市场营销活动，完成“[顾客沟通分析练习表](#)”(模块五的第四步)。这些沟通渠道依然适用吗？
Compare the marketing activities to the



completed **“Customer Communication Analysis Worksheets”** (from Module 5.4). Are the communication channels still appropriate?

- 审视性地评估现有市场营销活动(在此过程中充分考虑你到目前为止所获得的一切有关顾客, 产品和竞争对手的信息)。
Critically evaluate the current marketing activities (drawing upon all the knowledge about customers, products, competitors etc that you have gained so far during the program).
- 重新审视 **“市场营销行动计划”**。
Review the **“Marketing Action Plan.”**



5.7 确定一系列旨在使企业成长的市场营销和促销活动

Develop a list of marketing and promotional activities designed to grow your business

- 审视三个以销售为基础的战略以增加销售量；吸引更多的顾客(“A”类顾客)；增加平均销售额，增加与客户的交易次数

Review the 3 sales based strategies for increasing sales; attracting more customers (“A” class); increasing the average sales value and getting your customers to come back to you more frequently (increasing the number of sales per annum to that customer)

- 需要起草一份市场营销和促销日历。请参见 [“市场营销和促销宣传日历。”](#)



A Marketing and Promotional Calendar needs to be drawn up. Please refer to [“Marketing and Promotional Campaign Calendar.”](#)

- 每项活动的目的都需明确。这是非常重要的，因为，如果没有明确的目标，你就不可能知道是否实现了目标。例如，做报纸广告的目标可能是产生 200 个销售咨询电话。

For each activity, the purpose must be defined. This is critically important since unless you establish clear goals you will never know if you have achieved your objectives. For example, a goal for a newspaper advertisement may be to generate 200 inbound sales calls.

- 对每项活动都要进行衡量---切记，你只要能衡量，就能控制和管理！衡量每项活动的有效性可以使企业改进市场营销活动，并最终从花费的每一个铜板中得到更大的价值。用于衡量报纸广告的例子(或 KPI)可以是广告刊登后五天里出现的销售咨询数量。通过把 KPI 与市场营销目标联系起来，你就可以衡量这一活动的有效性。

Each activity must be measured – remember,

what you can measure you can manage!

Measuring the effectiveness of each activity will enable the business to refine marketing activities and ultimately get more value for each dollar spent. An example of a measurement (or KPI) for a newspaper advertisement could be the number of inbound sales calls in the 5 days following the advertisement. By having KPIs related to your marketing goals you are able to measure the effectiveness of the activity.

- 通过制定日程可以对行业的周期趋势进行更多的监控。

In developing the Calendar attention should be given to any industry cyclical trends.

5.8 开始撰写市场营销战略计划

Start documenting the Strategic Marketing Plan

- 企业现在可以开始撰写正式的市场营销战略计划。
The business is now ready to start documenting their formal Strategic Marketing Plan.
- 市场营销战略计划应当制定出企业今后 2—3 年的目标和实现这些目标的方法。
The Strategic Marketing Plan should set out the objectives and ways in which the business will achieve its' objectives for the next 2-3 years.
- “市场营销战略计划模本”已提供----请参见“市场营销战略计划”模本。
“A Strategic Marketing Plan Template” has been provided - please refer to “Strategic Marketing Plan” Template.
- 市场营销计划应当包括企业的下列主要领域:
The Marketing Plan should cover the following primary areas of the business:



- 前言---企业概述;
Introduction – Business Overview;
- 产品和服务;
Products and Services;
- 市场分析和评估;
Market Analysis and Evaluation;
- SWOT 分析;
SWOT Analysis;
- 市场评估;
Market Evaluation;

- 目标市场;
Target Markets;
 - 未来方向—战略发展;
Future Direction – Strategy Development;
 - 战略性市场营销战略;
The Strategic Marketing Strategy;
 - 业绩衡量;
Performance Measurement; and
 - 财务预测。
Financial Projections.
- 市场营销战略规划所需要的大量分析工作已经完成了。 请参见完成的 SNAQ。
A significant amount of the analysis required for the Strategic Marketing Plan has already been completed. Please refer back to the completed SNAQs.

模块六:企业系统化

Module 6: Business Independence

概述 Overview

本模块的目的是使企业系统化 其结果应当包括下列内容:

The purpose of this Module of the program is to systematise the business. The outcomes should include the following;

- 清楚适用的系统化文件(“我们的工作方式”手册);
Clear and appropriate systems documentation (The “This Is How We Do It Here” manual);
- 对员工的职责进行改进, 使其更清楚明白;
Improved role clarity for team members;
- 取消无效的工作;
Redundancy of wasted effort;
- 有效地权力下放;
Effective Delegation of tasks;
- 消除系统瓶颈;
Removal of system bottlenecks; and
- 使员工的知识产权得到利用和体现。
Capturing and making tangible the intellectual property of team members.

这一部分是项目中非常重要的步骤, 并将最终形成一个更具价值的企业。你要确保在这个过程中得到企业所有者和其他主要决策者的全力支持。应该以这样的态度来思考问题: “假如明天我要出售企业或者进行授权专卖, 我会需要准备哪些文件?”

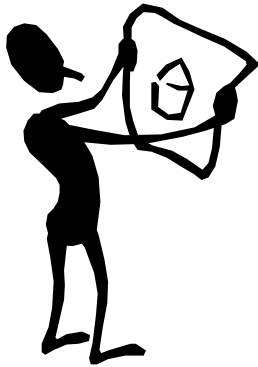
This is a very important in the program and ultimately will result in a more valuable business. You will need to ensure that you get the full support of the owners and other key decision makers to the process. The approach should be approached with the attitude of “if I was going to sell or franchise my business tomorrow, what would I need to have documented?”

“管理层有责任向员工阐明，其日常工作将如何有助于实现企业的目标，如果管理层无法解释这一工作的价值，则这份工作应当被取消，员工应当另行安排工作。”

Douglas Reid

施乐公司副总裁

摘自“哈佛商业评论”



“Management has a responsibility to explain to the employee how the routine job contributes to the business’s objectives, if management cannot explain the value of the job, then it should be eliminated and the employee reassigned.”

Douglas Reid

Vice President Xerox Corp

Harvard Business Review

主要学习目标


Key Learning Objectives


下列清单详细列举了模块六----“企业系统化”的主要学习目标的内容:

The following list details some of the Key Learning Objectives of Module 6 – Business Independence:

- 学习如何通过确认问题的“根源”来解决问题的办法;
To learn how to facilitate problem resolution through identifying the “root” cause
- 清楚和适用的系统文件 (“我们的工作方式”手册);
Clear and appropriate systems documentation (The “This Is How We Do It Here” manual);
- 使员工的职责描述更清楚明白;
Improved role clarity for team members;
- 取消无效的工作;
Redundancy of wasted effort;
- 消除系统瓶颈;
Removal of system bottlenecks;
- 使员工的知识产权得到利用和体现;
Capturing and making tangible the intellectual property of team members;
- 员工授权;
Team Member empowerment;
- 理解授权的概念和这会如何有助于释放员工的真正潜力;
To understand the concept of delegation and how this can help to unleash the true potential of our team members; and
- 建立一种方式使系统可以不断地得到创造和更新。
To establish a technique that enables systems to be continually created and updated.

工具 Tools

下列工具可以为你提供帮助。 这些工具与 “需完成的任务”部分相互参照 (以  表示):

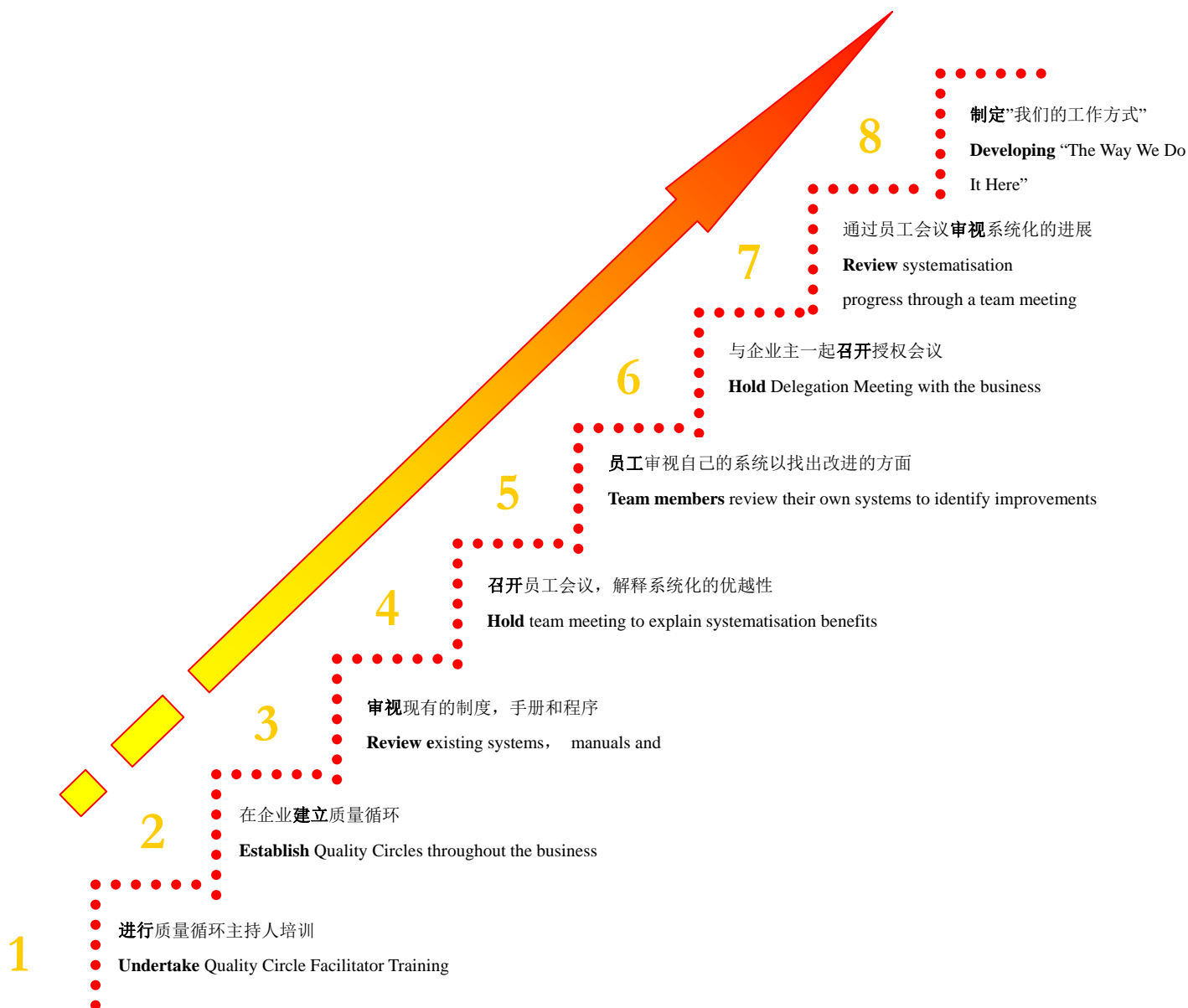
The following Tools have been provided to assist you. These Tools are cross-referenced throughout the “Tasks to Be Completed” section (denoted by ):

- 质量循环主持人培训文件包 (包括邀请信, 与会者工作手册, 主持人手册, 讲座准备清单和 PowerPoint 演示稿)
Quality Circle Facilitator Training Pack (includes invitation letters, participants workbook, facilitators guide, seminar checklist and PowerPoint presentation)
- 质量循环资源文件包 (包括员工邀请信, 会议报告和行动清单模本, 讲座准备清单 和 “如何进行一次质量循环活动” 主持人手册)
Quality Circle Resource Pack (includes team member invites, minutes and action list template, seminar checklist and “How To Run A Quality Circle” Facilitator Guide”)
- 员工会议(企业系统化)邀请函模本
Invitation to Team Meeting (Business Independence) Template
- “我们的工作方式” PowerPoint 演示稿
“The Way We Do It Here” PowerPoint Presentation
- “我们的工作方式”工作手册
The Way We Do It Here” Workbook
- 系统化案例研究
Systemisation Case Study
- 系统流程样本
Systems Flowchart Example
- 授权会议议程
Delegation Meeting Agenda

- 授权会议准备清单
Delegation Meeting Checklist
- 我的授权行动计划
My Delegation Action List
- 授权会议反馈表
Delegation Meeting Feedback Form
- 系统程序模本
Systems Procedure Template

典型的模块六程序

Typical Module 6 Program



需完成的任务

Tasks to Be Completed

6.1 进行质量循环主持人培训 Undertake Quality Circle Facilitator Training

- 经挑选的高级员工应该参加质量循环主持人培训。质量循环是确认和解决复杂问题的一种工具。在 BPIP 的这部分模块中，企业所有者应在企业内全面实施质量循环措施，以促进系统化进程。
Selected senior team members should undertake Quality Circle Facilitator training. Quality Circles are a tool for identifying and solving complex problems. During this module of the BPIP the owners of the business will be implementing Quality Circles throughout their business in order to assist the systemisation process.

- 经确认的质量循环主持人应当被邀请来参加一次 3 个小时的培训。要以寄发邀请函的方式邀请这些员工。请参见 [“质量循环主持人培训邀请函”](#)。安排好地点和点心饮料。

Identified potential Quality Circle facilitators should be invited to a 3-hour training session. Invite the team members via a letter. Please refer to [“Quality Circle Facilitator Training Invitation.”](#) Arrange a venue and the refreshments.

- 设施---白板，白板笔，电脑（供 PowerPoint 演示之用），纸，笔，投影仪。请参见 [“质量循环主持人培训会议准备清单。”](#)

Equipment – whiteboard, marker pens, computer (for PowerPoint presentations), paper, pens, projector. Please refer to



“Quality Circle Facilitator Training Session Checklist”

- 培训应该是愉快和有激励性的。 我们已提供了包含下列内容的“**质量循环主持人培训文件包**”:
The training session should be fun and motivating. We have provided a **“Quality Circle Facilitator Training Pack”** that contains;



- 培训邀请函;
Workshop invites;
- 与会者工作手册;
Participants Workbook;
- 主持人手册;
Facilitators Guide;
- 培训准备清单;
Seminar Checklist;
- 培训反馈表;
Seminar Feedback Forms; and
- PowerPoint 演示稿。
PowerPoint Presentation.

6.2 在企业内全面推行质量循环

Establish Quality Circles throughout the business

- 企业的每个职能部门都应建立质量循环。
Quality Circles should be established within each functional area of the business.
- 你需要给每个质量循环主持人发一套质量循环资源文件包。 每套文件包里有：
You will need to issue Quality Circle Resource Packs to all the facilitators. Each resource pack contains;
 - 员工邀请函;
Team Member Invites;
 - “怎样实施一个质量循环”主持人手册;
“How To Run A Quality Circle” Facilitator Guide; and
 - 会议记录和行动清单模本。
Minutes and Action List Template.
- 应当给员工发出正式邀请函---请参见 “质量循环资源文件包”。
Formal invitations should be sent to team members – Please refer to “Quality Circle Resource Pack”
- 质量循环会议旨在为员工解决运行中的问题。 这就需要程序具备以下的功能：
The purpose of the Quality Circle session is for team members to solve operational problems. This requires a process whereby;
 - 通过头脑风暴来找出问题，并列出问题解决的先后次序;
Problems are brainstormed and



prioritised;

- 问题的症状得到确认，并列出先后次序;
Symptoms are identified and prioritised;
- 通过头脑风暴找出可能的问题根源，并列出先后次序;
Possible causes are brainstormed and prioritised; and
- 通过头脑风暴找出解决方案。
Possible solutions are brainstormed.

- 每次会议结束后，主持人都应该向咨询顾问做 1 小时的会议情况通报。
After each session the facilitator should undergo a 1-hour session debrief with the consultant.

- 每次会后两天之内应该把会议记录和行动清单发给每位与会者。有关会议记录和行动清单模板请参见 [“质量循环资源文件包”](#)。
Minutes and Action Lists should be distributed to all participants within 2 days of each session. Please refer to [“Quality Circle Resource Pack”](#) for the minutes and action list template.



6.3 审视现有系统，手册和程序

Review existing systems, manuals and procedures

- 收集企业现有的系统文件，包括操作手册，书面程序文件等。

Collect all the existing systems documentation that the business currently has including operations manuals, written procedures etc.

- 审阅这些材料，将观察所得作成注解，例如，你是否能立即发现这些程序中的瓶颈，多余的或无意义的任务，和重复性的工作？

Review the materials and make notes regarding your observations of the systems e.g. can you immediately identify any bottlenecks in the processes, redundant or pointless tasks and duplication of effort?

- 在审阅这些手册时，应考虑以下问题：

As you review the manuals ask yourself the following questions;

- 这些手册清楚明了，并能提供相应的信息吗？

Are the manuals clear and informative?

- 如果你是新员工，这些手册能准确地告诉你如何工作，从而使你顺利完成工作吗？

If you were a new team member would the manuals tell you precisely how to do your job so that you are successful every time?

- 他们是否告诉你，为什么要完成这项工作，谁来完成它，什么时候完成，在什么地方完成，它在整个程序中的位置是什么？

Do they tell you why the task is done, who it is done by, when it is done, who

does it and where the task is done and where the task fits into the overall process?

➡ 对这项工作，是否制定了相应的 KPI?
Are there relevant KPIs identified for the task?

➡ 这些手册的表现形式合适吗？是否应该采用更多的图片？----不要忘了，一张图片能代替一千个字的文字说明!
Is the format of the manuals appropriate?
Should more pictures be used – remember a picture can paint a “1000” words!

- 记住，在那些显示出“潜在的”瓶颈或问题的地方要做很多注解。
Remember to make lots of notes of the areas that indicate “potential” bottlenecks or problems.

- 你也许会发现，企业根本没有操作手册。如果是这种情况，请切记，你要对整个企业全面考察一遍。
You may find that the business has no operations manuals. If this is the case, please ensure that you do a walk through the business

6.4 召开员工会议，解释系统化的好处

Hold team meeting to explain the benefits of systematisation

- 这一会议旨在使员工们了解 BPIP 的这个阶段的内容，解释他们在这个过程中的参与作用。

The purpose of the meeting is to inform team members about this stage of the BPIP and explain their involvement in the process.

- 员工们应得到企业老板/总经理的正式邀请函。请参见 [“\(企业系统化\) 员工会议邀请函模本。”](#)

Team members should be formally invited to the meeting by the Owner / Managing Director. Please refer to [“Invitation to Team Meeting \(Business Independence\) template](#)



- 应当在会上讲解系统化的好处。请参见 [“我们的工作方式”PowerPoint 演示稿](#)。这份演示稿大致说明了系统化的好处和该项目如何实施。它还包括了一些案例分析，例如麦当劳，Project 空调等企业的实例。

At the meeting, the benefits of systematisation should be explained. Please refer to the [PowerPoint Presentation “The Way We Do It Here.”](#) This presentation outlines the benefits of systematisation and how the project will be undertaken. It also includes some case study examples such as McDonalds and Project Air Conditioning



- 在会上，要求所有员工列出对他们顺利完成工作至关重要的 5 个系统。请参见[“我们的工作方式工作手册。”](#)

At the meeting you will be asking all team members to list 5 “systems” that are critical for



success in their jobs. Please refer to **[“The Way We Do It Here Workbook.”](#)**

- 要注意给员工机会提出关于程序的问题。 员工是提供程序创新的信息来源，所以，你得到他们的帮助是非常关键的。

Ensure that you give team members the opportunity to ask questions about the process. It is critical that you get their support since they will generally be the source of information that results in process innovations.

- 安排下一次会议的时间。 应该是在第一次会议之后的大约 4 周左右举行。

Schedule the next meeting. It should be held approximately 4 weeks after the first meeting

6.5 员工审视自己的系统，并找出可以改进的地方

Team members review their own systems and identify improvements

- 在员工将其系统文字化之前，应当让他们以观察员的身份把这些系统逐一审查一遍，确保这些系统化本身具有可操作性。

Before team members document their systems it is essential that they perform a walk-through their own systems with an observer to ensure that the system itself works.

- 每一位员工都应当请一位同事与他们一起把整个系统审查一次。同事的作用是扮演一个“挑剔者”，即，批判性地评价这个系统。在进行这一审视中，员工应当在保证控制产品质量和客户服务水平的同时，积极地寻找减少工作量的办法。

Each team member should invite a co-worker to walk through the system with them. The role of the co-worker is to be the “devils advocate” i.e. to critically evaluate the system. In doing the walk-through, team members should pro-actively seek ways to reduce the work required while maintaining controls, product quality and customer service levels.

- 一旦两位员工就正确的系统达成一致，则该系统应(以图解的形式)制成正式文件。这就是系统流程图。我们在这里提供了一份样本。请参见“[系统流程图样本](#)。”

Once both team members have agreed on the correct system it must be documented (diagrammatically). This is called a systems flowchart and we have provided an example for you. Please refer to the “[Systems Flowchart Example](#).”



- 为了帮助员工了解这个过程，请确保让他们在撰写系统之前，阅读我们提供给你的“[系统化案例](#)”

研究”。

To assist team members to understand the process, please ensure that they read the “Systemisation Case Study” that we have provided to you prior to documenting their own systems.



- 一旦系统得到一致认可，应当按照 “系统程序模板”来撰写。

Once the system has been agreed upon it should be documented using the “Systems Procedure Template.”



- 同样，员工应该找一位同事批判性地评价他们的系统文件，并逐一审查这些系统。

Once again, the team member should use a co-worker to critically evaluate their documentation and again walk through the system.

6.6 与企业所有者一起召开“授权”会议

Hold a “delegation” meeting with the business owners

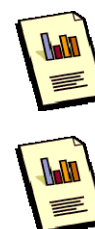
- 在这个阶段，你应该与企业所有者(和部分经理，如果合适的话)开会，探讨把他们的部分责任授权给员工的可能性。

During this section you should hold a meeting with the business owners (and if appropriate selected managers) to explore possibilities for delegating some of their duties to team members

- 授权给员工有很多好处:
Delegating work to team members has many advantages, including:

- 调动员工的积极性;
Empowering team members;
- 形成一个接班人计划;
Creating a succession plan; and
- 企业所有者和高级管理层可以从“行政管理”的时间里解脱出来，把更多的时间用在企业的战略上。
Freeing up “executive time” so that the business owners and executive management team can spend more time working “on” the business

- 我们为你提供了 [“会议议程模板”](#)。请确保在会议召开前至少两天把议程发给与会者。会议准备清单也提供了----请参见 [“授权会议准备清单”](#)。
We have provided a [“Meeting Agenda Template”](#) for you. Please ensure that you send the agenda to all attendees at least 2 days prior to the meeting. A session checklist has also been provided – please refer to [“Delegation](#)



Meeting Checklist

- 在会上，要与参会者逐一讨论 “我的授权行动清单”。

During the meeting you will be working through “My Delegation Action List.” with the attendees



- 会议的目的是使每一位与会者都制定出自己的授权行动清单。此外，每一位与会者在会议结束时要非常清楚如何有效地实行授权程序，从而对自己和员工双方都达到最好效果。

The purpose of the meeting should be to develop a delegation action list for each participant. In addition, each participant should leave with a good understanding of how to effectively go about the delegation process in order to maximise the benefits to both themselves and their team members.

- 这里提供了 “授权会议反馈表”。
“Delegation Meeting Feedback Forms” are also provided



6.7 评价系统化进程

Review systematisation progress

- 到此时，“系统化项目”应该已经完成了大部份工作。因此，现在可以召开另一次员工会议来评价项目的进展。

By this time a lot of work will have been undertaken on the “systematisation project.” It is now time to hold another team meeting to review progress.

- 这次会议旨在评价员工在完成其系统的文件化方面的进展。这应该是一次非正式的会议，因此，不需要准备议程。

The purpose of the meeting is to review the progress that team members have made in respect to documenting their systems. This should be a very informal meeting and therefore no agenda has been provided.

- 会上要给员工提供机会讨论他们在撰写前 5 个系统时遇到的困难。

The meeting provides an opportunity for team members to share any difficulties they experienced in documenting their first 5 systems.

- 员工参加会议时一定要带上自己的系统文件，这样他们才能与其他员工一起分享他们的成就。这次会议应当开成一次庆祝会，员工们的努力要得到真诚地感谢。

Team members should be asked to bring along their systems documentation so that they can share their achievements with their fellow team members. The meeting should be treated as a celebration and it is important that team members are sincerely thanked for their efforts.

- 要准备回答员工在系统化方面的任何问题。特别

是，你可能需要重复解释重要性/价值的分类。

Be prepared to answer any questions that the team members may have in regards to systemisation. In particular you may need to revisit the explanation of the salience / worth classifications.

- 向员工解释，下一步的任务是成立一个项目小组，把他们所有的系统编入“我们的工作方式”手册。
Explain to the team members that the next stage involves a project team pulling together all their systems into a “The Way We Do It Here” manual.
- 要求每位员工再完成 5 个重要的系统，并规定在 2—4 周的时间内完成。
You will ask each team member to add 5 more critical systems to their list and set a 2-4 week deadline for their completion

6.8 把所有的系统编入”我们的工作方式手册” Bringing it all together in “The Way We Do It Here Manual”

- 最后， 你需要成立一个项目小组把所有的系统归结在一起。

Finally, you will need to appoint a project team to pull it all together.

- 这个项目小组负责编写”我们的工作方式”手册。
The project team is responsible for compiling “The Way We Do It Here” Manual.

- 你需要同他们见面并就项目的程序给他们作详细介绍。要确保向他们介绍项目的价值和对企业中每个人的益处。

You will need to meet with them and brief them on the process. Ensure that you explain to them the value of the project and how it will benefit everyone in the organisation.

- 这个手册要包含员工所提出的系统和程序。 我们在《**SME 实用手册**》里提供了操作手册模本， 以协助完成这一任务。 请参见该手册， 并根据企业的情况进行调整和改变。



The manual will comprise of the systems and processes that the team members have been developing. To assist in the process we have provided an Operations Manual Template in the **SME Manual**. Please refer to this manual and make the changes that are appropriate for your business

- 制定一份完成这个项目的行动计划。 该计划应包括:

Develop an Action Plan for completing the project. The plan should detail;

- ➡ 要采取什么行动;

What action will be taken;

➡ 谁来实施;
By whom; and

➡ 什么时候行动。
By when.

- 选择企业的每个职能领域的“手册执行者”。
Appoint “Manual Champions” for each functional area of the business
- 最后， 选择一个庆祝的日期！ 企业已经完成了又一个重要的里程碑。
Finally, set a date to celebrate! The business has reached another key milestone.

模块七:组织结构, 知识, 环境管理和技术应用战略

Module 7: Organisational Structure, Knowledge, Environmental Management and Technology Strategies

概述 Overview

知识是创造企业价值的极其重要的部分。本项目的这一部分要讨论的是通过体现专有知识而增加企业价值的方法。

Knowledge is an extremely important part of what makes your business valuable. This part of the program looks at ways in which you can increase the value of your business through making your proprietary knowledge tangible.

*“告诉我我会忘记;
给我看我会记住;
但如果让我做我会理解”*

*老子
公元前500年*

*“Tell me, I’ll forget.
Show me, I may remember.
But involve me and I’ll understand.”*

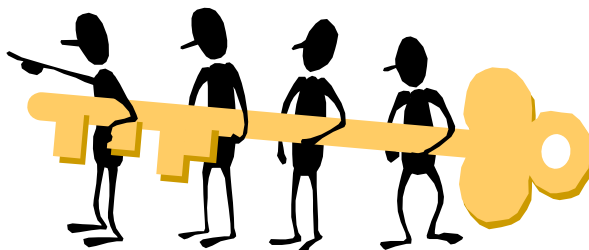
*Lao Tzu
500 B.C.*

研究表明, 如果你告诉某人某件事情,两年以后, 他们只能记住这件事的 7% 的内容。如果他们看一个录像, 他们能记住 15% 的内容。但是, 如果让他们通过角色表演, 经验或模拟操作来作一件事情, 则 67% 的内容能够被记住! 这向我们显示了采取基于角色演示和模拟而获得知识的知识战略的重要性。

Research tell us that if you tell someone something....2 years later they will only remember 7% of what was said. If they watch a video then they will retain 15% of the information BUT if we involve them through role-play, experience or simulation **67%** of what is learnt will be retained! This illustrates to us the importance of having a knowledge strategy that is based on knowledge transfer through role-play and simulation.

这一模块要考察企业很多不同的领域， 根据企业类型的不同，所需要完成的工作也不尽相同。但是， 所有的领域都必须包括在内。 祝你好运!

This module examines many different areas of the business and the extent to which work will need to be undertaken is heavily dependent upon the type of business you are working with. However all areas should be examined. Good Luck!



主要学习目标


Key Learning Objectives

下列清单详细列举了模块七---组织结构， 知识， 环境管理和技术应用战略的主要学习目标的部分内容：

The following list details some of the Key Learning Objectives of Module 7 – Organisational Structure, Knowledge, Environmental Management and Technology Strategies:

- 理解企业的组织结构将如何影响企业文化;
To get an understanding of how the organisational structure of the business affects the business culture;
- 理解不同的组织结构类型以及各类结构的优劣;
To gain an understanding of different types of organisational structures including the advantages and disadvantages of each;
- 理解每个员工的角色如何溶入到整个组织;
To gain an understanding of how each team members role fits into the organisation;
- 理解制定知识战略的重要性;
To understand the importance of having a knowledge strategy in place;
- 针对企业发展需要的资源， 明确并制定出技术行动计划;
To identify and develop a technology action plan for the resources that are required moving forward;
- 理解环境对企业运行的影响;
To understand the environmental impact of the businesses operations;
and
- 理解和实行有利于创新和持续改进的系统。
To understand and implement a system for innovation and continuous improvement.

工具 Tools

下列工具为你提供帮助。 这些工具与“需完成的任务”部分 相互参照 (以  表示):

The following Tools have been provided to assist you. These Tools are

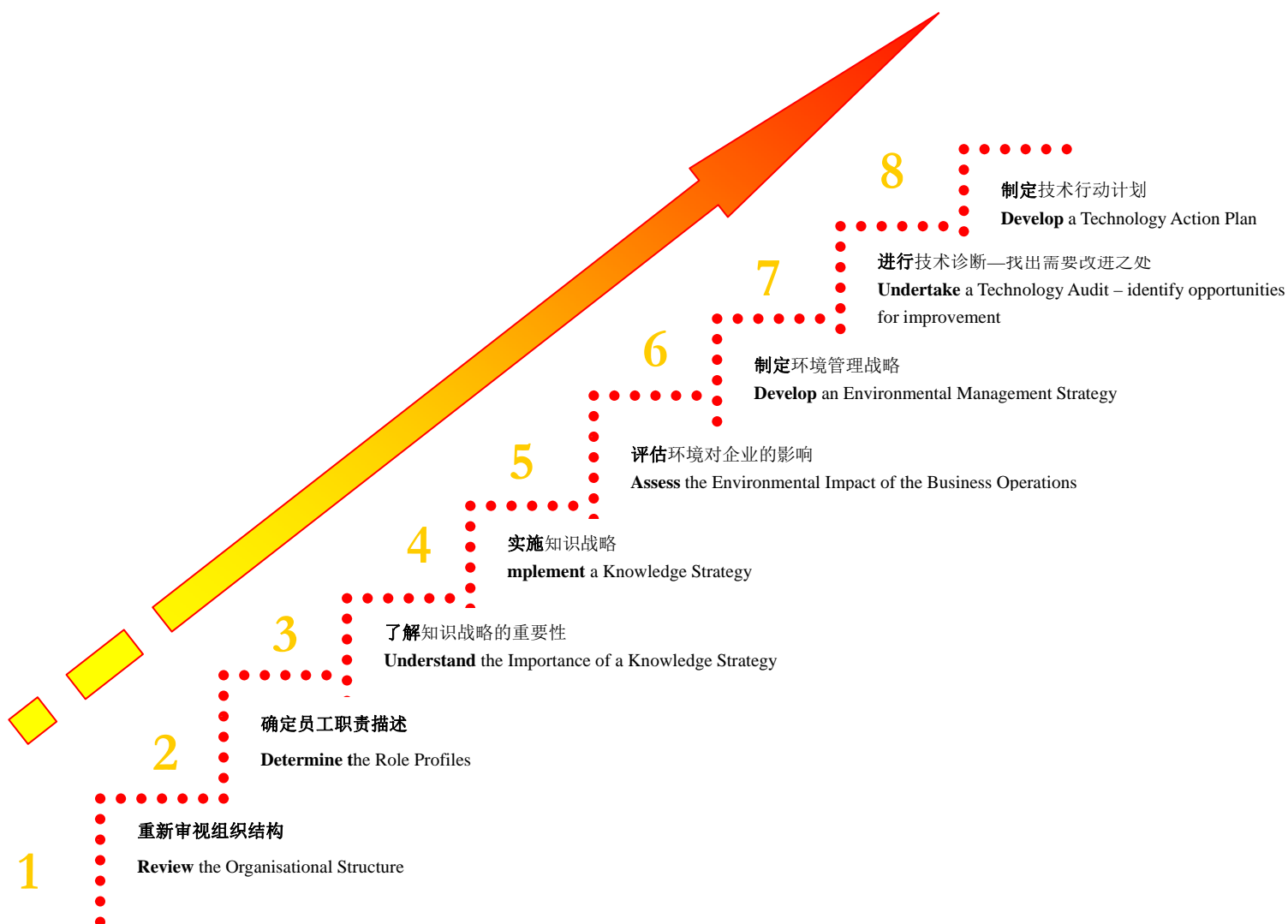
cross-referenced throughout the “Tasks to Be Completed” section (denoted by ):

- 组织结构工作手册
Organisational Structure Workbook
- 组织结构会议议程
Organisation Structure Meeting Agenda
- 组织结构会议准备清单
Organisational Structure Meeting Checklist
- 组织结构会议反馈表
Organisational Structure Meeting Feedback Form
- 我的角色描述和个人表现计划工作手册
My Role Profile and Personal Performance Plan Workbook
- 角色描述和个人表现计划会议议程
Role Profile and Personal Performance Plan Meeting Agenda
- 角色描述和个人表现计划会议准备清单
Role Profile and Personal Performance Plan Meeting Checklist
- 角色描述和个人表现计划会议反馈表
Role Profile and Personal Performance Plan Meeting Feedback Form
- 学习型组织文章选编
Selected Articles on Learning Organisations
- 知识战略会议议程模本
Knowledge Strategy Meeting Agenda Template

- 知识的价值 PowerPoint 演示稿
The Value of Knowledge PowerPoint Presentation
- 知识战略模本
Knowledge Strategy Template
- 环境管理诊断
Environmental Management Audit
- 环境管理文章选编
Selected Environmental Articles
- 环境行动计划会议议程模本
Environmental Action Plan Meeting Agenda Template
- 保护环境 PowerPoint 演示稿
Looking After The Environment PowerPoint Presentation
- 环境管理工作手册
Environmental Management Workbook
- 技术诊断
Technology Audit
- 技术 SWOT 和行动计划
Technology SWOT and Action Plan
- 技术行动计划会议议程模本
Technology Action Plan Meeting Agenda Template

典型的模块七程序

Typical Module 7 Program



需完成的任务

Tasks to Be Completed

7.1 重新审视组织结构

Review the organisational structure

- 实施 BPIP 其间所进行的工作可能意味着企业过去形成的组织结构已经不能适应或支持企业的目标。因此，现在重新审视组织结构来评估其适用性是非常重要的。

The work that has been done during the BPIP may mean that the historic organisational structure of the business is no longer valid or supportive of the goals and objectives of the business. Therefore it is important at this point to review the organisational structure to assess its' fit.

- 为了完成这一任务，你需要与企业所有者一起召开一次会议。企业所有者应当邀请其他管理层成员参加这次会议，因为尽早取得对必须进行的改革的支持是非常重要的。

In order to facilitate a review of the structure you will need to hold a meeting with the business owners. The business owners should also invite other members of the management team to the meeting since it will be important to gain support early for any changes that need to happen.

- 这次会议的目的是回顾评价现有组织结构、其它选择方案、评价不同结构的优劣，并最终评估需要对企业现行组织结构进行哪些改革。

The purpose of the meeting is to review current perceptions of the organisational structure, review alternatives, and evaluate the advantages and disadvantages of different structures and finally assess what changes need

to be made to the current organisational structure of the business.

- 我们为你提供了一份会议议程样本----请参见 [“组织结构会议议程”](#)。我们还提供了一份需要由与会者完成的 [“组织结构工作手册”](#)。

We have provided a sample Meeting Agenda for you – please refer to [“Organisational Structure Meeting Agenda”](#). We have also provided a [“Organisational Structure Workbook”](#) for the attendees to complete during this meeting.



- 对这次会议形成的关于对组织结构进行的改革，应当以积极的方式向所有员工宣布。

Any changes to the organisational structure that result from this meeting should be communicated in a positive manner to all team member

7.2 确定岗位描述

Determining Role Profiles

- 一旦理想的组织结构确定后，相关的经理们应当回顾评估所有岗位的描述以确定需要进行哪些改革。有些情况下，需要为新产生的岗位准备岗位描述。关于岗位描述，请参见“[招聘工具箱](#)”。



Once the preferred organisational structure has been determined the appropriate managers should review all role profiles to determine what changes need to be made. In some instances, role profiles for newly created positions may need to be prepared. Please refer to the “[Recruitment Toolbox](#)” for a Role Profile template.

- 一旦岗位描述评估完成后，企业应当召开一次员工会议。这次会议的目的是向员工通报新的组织结构和改革的原因。此外，所有员工都将得到一份自己的岗位描述，并审查这是否与他们所认为的自己的岗位职责相吻合。

Once the review of the roles has been undertaken the business should hold a Team meeting. The purpose of this meeting is to share with team members the new organisational structure and the reasons for the changes. In addition, all team members will be provided with a copy of their role profile and asked to review if this is an accurate reflection of how they believe their position should be.

- 在会上，所有员工都应得到一份“[我的岗位描述和个人表现计划工作手册](#)。”我们还提供了一份“[岗位描述会议](#)”议程。



At the meeting all team members should be provided with a copy of their role description and “[My Role Profile and Personal Performance Plan Workbook](#).” We have



also provided a [“Role Profile Meeting Agenda” Template](#).

- 员工应该有 2 周的时间来完成他们的岗位描述，并加入他们认为相关的技能和 KPI。
Team members should be allowed 2 weeks to complete their role profiles and add any competencies or KPI's that they believe are relevant.
- 岗位描述完成后， 经理应当审阅并批准所有岗位描述的正式文本。
Once completed , the managers should review and give approval to all finalised role profiles.

7.3 了解知识战略的重要性

Understand the importance of a Knowledge Strategy

- 这一部分旨在了解知识的价值和“知识战略”可能对企业的竞争力和价值带来的影响。

The purpose of this section of the Module is to understand the value of knowledge and the impact that a “Knowledge Strategy” can have on the competitiveness and value of the business.

- 首先，企业所有者需要了解“信息”和“知识”两者的区别，因为这两者经常会混淆。

Firstly, the business owners will need to understand the difference between “information” and “knowledge” as this is often confused!

- 信息是指“是什么”，而知识是讲“如何是这样”。一般地说，掌握“知识”的是我们人类。与信息相比较，知识更复杂，更有价值，更难以获得！知识是信息+理论+经验(或诀窍)的结果。学习和知识之间有着内在的联系。

While information is said to be the “what,” knowledge is the “how.” Generally it is our people that hold the “knowledge.” When compared to information, knowledge is more complex, valuable and elusive! Knowledge is the result of information + theory + experience (or know-how). There exists an intimate link between learning and knowledge.

- 在当今日益增强的竞争环境中，企业成为“学习型组织”是非常重要的。请让企业所有者阅读[“学习型组织文章选编”](#)，这些文章详细介绍了某些非常成功的企业如何成为了学习型组织。

In today's increasing competitive environment it is critical that businesses become “learning organisations.” Please ask the business owners to review the [“Selected Learning](#)



Organisation Articles” that detail how some very successful organisations have adapted to become ***learning organisations***.

- 通过使员工获得知识，可以使企业更有价值。例如，日本的企业利用西方发明的技术，通过认识和将新技术应用在新的未被认识的或未被满足的需求方面，而创造了许多突破性产品。

By capturing the knowledge of our team members we can make our businesses more valuable. For example, by recognising and exploiting the implications of new technologies to address new unrecognised or unmet needs, Japanese companies have produced many product breakthroughs using technology that originated in the West.

7.4 实施知识战略

Implementing a Knowledge Strategy

- 现在，企业必须制定和实施自己的知识战略。
The business must now develop and implement its own Knowledge Strategy.
- 知识战略应当帮助企业成为一个“学习型组织”。
The Knowledge Strategy should support the business to become a “*learning organisation*”.
- 为了制定知识战略，你需要召开一次头脑风暴会。
每个职能领域的经理都应当被邀请参加。
You will need to hold a brainstorming session in order to develop the Knowledge Strategy. The manager of each functional area should be invited to this meeting.
- 我们提供了一份这次会议的议程样本---请参见“[知识战略会议议程](#)”模本。
We have provided a sample agenda for the meeting – please refer to “[Knowledge Strategy Meeting Agenda](#)” Template.
- 会议议程要至少在会议开始前两天发给与会者。
Send the agenda to all participants at least 2 days prior to the meeting.
- 我们为会议提供了一份有助于解释成为“学习型组织”的价值的 PowerPoint 演示稿---请参见“[知识的价值 PowerPoint 演示稿](#)”。
We have provided a PowerPoint presentation for the meeting that helps to explain the value of becoming a “*learning organisation*” – please refer to “[The Value of Knowledge PowerPoint Presentation](#).”
- 这次会议的目的是制定企业的知识战略。 为此，



我们提供了一份模本—请参见 [“知识战略模本”](#)。
The purpose of the meeting is to develop the Knowledge Strategy for the business. We have provided a template for this – please refer to the [“Knowledge Strategy Template.”](#)



- 该模本详细包含了：
The template details;
 - 将采取什么行动;
What action will be taken;
 - 谁来实施;
By whom;
 - 什么时候行动;
By when; and
 - 任命一位改革过程的牵头人
Nominates a champion for the change process.

7.5 评估环境对企业运行的影响

Assess the environmental impact of business operations

- 企业活动对环境的影响日益受到政府，消费者和其它关注公共利益的团体的高度监视。因此，企业采取积极主动的姿态关注环境问题和对环境负责就显得很重要。

The environmental impact of business activities is coming under increasingly intense scrutiny from Governments, consumers and other public concern bodies. It is therefore important that businesses are proactive in their approach to addressing environmental issues and in being environmentally responsible.

- 为了明确企业生产对环境的影响，企业需要完成“环境管理诊断”---请参见 [“环境管理诊断。”](#)

In order to establish the impact that the business has on the environment in which it operates, the business will need to complete the “Environmental Management Audit”– please refer to [“Environmental Management Audit.”](#)



- 讨论可持续性，污染，臭氧量大幅度减少以及其它环境问题的文章很多。我们为企业所有者选编了一些文章供他们阅读---请参见 [“环境问题文章选编”](#)。

There are a multitude of articles dealing with sustainability, pollution, ozone depletion and other environmental issues. A selection of articles has been provided for the business owners to read – please refer to [“Selected Environmental Articles.”](#)



- 下一步，你需要与企业所有者一起开会讨论环境管理战略和确定今后的行动计划。企业所有者在环境管理会议之前要阅读选编里的文章。

In the next step you will need to hold a meeting with the business owners in order to review their

environmental management strategy and to determine an action plan for moving forward. The business owners will need to read the selected articles prior to the Environmental Management meeting.

7.6 起草环境行动计划

Draft an Environmental Action Plan

- 为了起草环境行动计划，你需要与企业所有者开会。这次会议的目的是使企业所有者了解合理的环境管理和起草环境行动计划的重要性。我们建议请一些高级员工也参加会议。我们提供了会议的样本议程---“[环境行动计划会议议程](#)”模本。



In order to draft an Environmental Action Plan you will need a meeting with the business owners. The purpose of the meeting is to educate the owners as to the importance of proper environmental management and to draft an Environmental Action Plan. We recommend that you involve some senior team members in this process. We have provided a sample agenda – [“Environmental Action Plan Meeting Agenda” Template.](#)

- 我们提供了会议的演示稿，以帮助你解释应该考察的环境问题。---请参见 [“保护环境 PowerPoint 演示稿。”](#)



A presentation has been provided for the meeting that helps to explain the environmental issues that should be examined – please refer to [“Looking After the Environment PowerPoint Presentation.”](#)

- 还有一份工作手册可以用来帮助与会者进行一些练习。这次会议的意图是制定企业的环境行动计划。我们为此提供了一份模本---“[环境管理工作手册](#)”。



There is also a workbook to assist meeting participants through a number of exercises. The purpose of the meeting is to develop the Environmental Action Plan for the business. We have provided a template for this – [“Environmental Management Workbook.”](#)

- 工作手册包含了：
The workbook goes through:
 - 环境 SWOT 分析;
Environmental SWOT Analysis;
 - 环境定位战略;
Environmental Positioning Strategy;
 - 环境战略行动计划;
Environmental Strategy Action Plan;
 - 日常管理行动计划;
Housekeeping Action Plan; and
 - 方面和影响。
Aspects and Impacts.
- 任命一位改革过程牵头人。
Nominate a champion for the change process

7.7 进行技术诊断和明确改善机会

Undertake a Technology Audit and identify opportunities for improvement

- 企业的技术战略要支持企业的宗旨，远景和目标，这是很关键的。

It is critical that the Technology Strategy of the business supports the business mission, vision and objectives.

- 首先，你需要让企业所有者完成 “技术诊断”。诊断的意图是考察利用技术的程度，明确通过利用技术改善企业的机会。



First you will need to get the business owners to complete the “Technology Audit”. The purpose of the audit is to examine the extent to which the business embraces the use of technology and identify opportunities for improving the business through the use of technology.

- 技术诊断要让企业所有者在五个主要领域对他们的表现打分：

The Technology Audit asks the business owners to rank their performance in 5 key areas:

- 技术应用战略;
Technology Strategy;
- 生产;
Operations;
- 行政管理和会计;
Administration and Accounting;
- 销售和市场营销;
Sales and Marketing; and

➤ 人力资源管理。

Human Resource Management.

- 企业所有者完成诊断后，你就可以同他们一起审视性地评价现有的技术应用活动（基于你目前所获得的全部信息），并决定是否需要请一位“技术专家”来协助。

Once the business owners have completed the audit you will be able to have a meeting with the business owners in order to critically evaluate the current technology activities (drawing upon all the information you have gathered so far) and decide whether a “Technology Expert” should be engaged to assist in the process.

- 这次会议还可以用来准备技术应用行动计划。
The meeting will also be used to prepare a Technology Action Plan.

7.8 制定技术应用行动计划

Develop the Technology Action Plan

- 你需要与企业所有者开会，讨论他们的技术应用战略和企业目前采用的技术方面必须注意的问题。
You will now need to hold a meeting with the business owners to discuss their technology strategy and the issues that must be addressed in regards to the technology that is currently employed within the business.



- 我们为这次会议准备了样本议程----请参见[“技术应用行动计划议程”模本](#)。
We have provided a sample agenda for the meeting – please refer to [“Technology Action Plan Meeting Agenda Template.”](#)

- 要至少在会议前两天将议程发给与会者。
Send the agenda to all participants at least 2 days prior to the meeting.

- 你还可以请一位相关的外部“技术专家”参加这次会议。
You may also choose to have a relevant external “Technology Expert” present at the meeting.

- 你必须在会前审阅已完成的技术应用诊断，并将其交给与会者评价。
You must review the completed Technology Audits prior to the meeting and you should have copies at the meeting for review.

- 合适的话，每个职能领域的经理都应被邀请参加会议。
Where appropriate the manager of each functional area should also be invited to this meeting.

- 会议的意图是完成 SWOT 分析和制定技术应用行动计划。 我们为此提供了模板---请参见 [“技术应用 SWOT 和行动计划。”](#)



The purpose of the meeting is to complete the SWOT analysis and develop the Technology Action Plan. We have provided a template for this – please refer to the [“Technology SWOT and Action Plan.”](#)

- 这一工作手册系统地分析了解决这些问题的程序，明确了必须采取的行动。 这次会议的结果是制作完成一份详细的行动计划。

This workbook systematically goes through the process of dealing with the issues and identifying the actions that must be taken. The output of the meeting should be a detailed action plan.

模块八:反馈和持续改善

Module 8: Feedback and Continuous Improvement

概述 Overview



最后的这个阶段是把全部计划纳入一组管理工具，该工具可以用于企业的日常经营之中。企业增长的关键是对真正起作用的因素进行衡量，然后相应地调整你的战略。衡量必须成为管理过程的一个内在部分。

This final stage is about pulling the whole program together in a set of management tools that can be used in the day-to-day running of the business. The key to growing a business is to measure the things that really count and then adjust your strategy accordingly. Measurement must be an integral part of the management process.

在这部分里，企业所有者要：

During this stage the business owners will;

- 制定和实施平衡记分卡系统；
Develop and implement the Balanced Scorecard System;
- 制定 3 年主要业绩指标经营计划；
Develop a 3 Year Key Performance Indicator Business Plan;
- 学习作业成本原则；
Learn the principles of Activity Based Costing;
- 制定监督外部环境的系统；
Set up systems to monitor their external environment;
- 制定年度战略计划日程；
Develop an Annual Strategic Planning Calendar; and
- 实施能够使企业领先于竞争对手的系统。
Implement a system to ensure they stay in front of their competitors.

学习目标


Learning Objectives


下列详细列举了模块八---“反馈和持续改善”的主要学习目标的部分内容:

The following list details some of the Key Learning Objectives of Module 8 – Feedback and Continuous Improvement:

- 制定主要业绩指标系统， 使企业所有者可以根据企业远景， 宗旨和战略目标来监控企业的表现；
To develop a Key Performance Indicator system that allows the business to monitor its performance against Vision, Mission and Strategic Goals;
- 建立平衡记分卡， 使企业能够运用主要的财务业绩指标；
To develop Balanced Scorecards for the business to compliment the financial key performance indicators;
- 制定公司治理系统；
To develop an organisational governance system;
- 了解作业成本；
To develop understanding of activity based costing;
- 确保企业所有者继续注重不断的评估和改善；
To ensure that the owners of the business continue to focus on continuous measurement and improvement;
- 了解监控企业外部和内部环境的重要性；
To develop an understanding of the importance of monitoring both the external and internal business environment; and
- 实施一种系统能够保证在需要时可以随时进行战略的调整。
To implement a system where changes to strategy are implemented as required.

工具 Tools

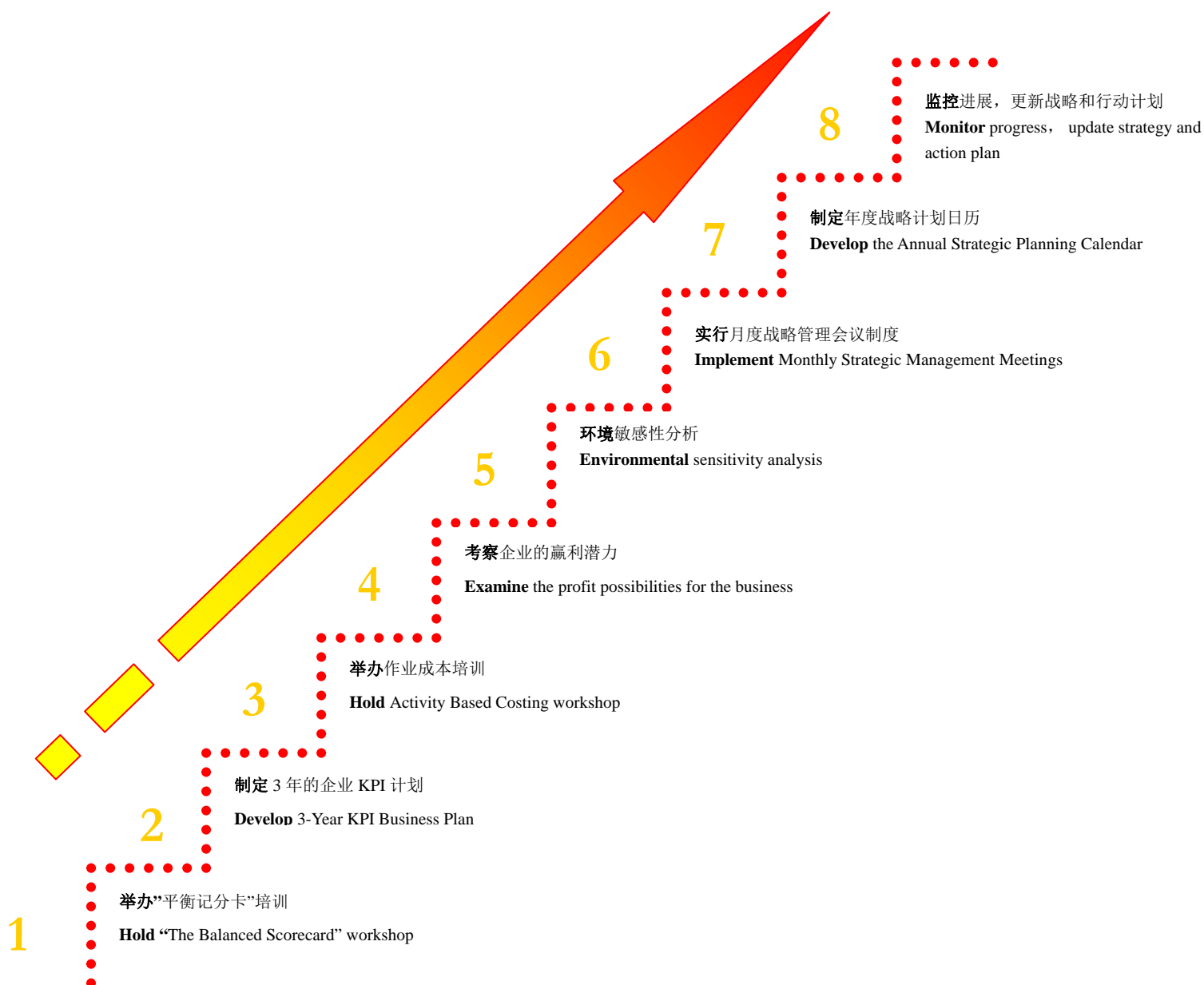
下列工具可以帮助你工作。 这些工具与“需完成的任务”部分相互参照(以  表示):

The following Tools have been provided to assist you. These Tools are cross-referenced throughout the “Tasks to Be Completed” section (denoted by ):

- 平衡记分卡培训资源文件包(包括邀请函, 主持人手册, 与会者工作手册, PowerPoint 演示稿, 培训准备清单和反馈表)
Balanced Scorecard Workshop Resource Pack (includes invites, facilitator guide, participant workbook, PowerPoint presentation, seminar checklist and feedback forms)
- 3 年主要业绩指标经营计划模本
3 Year Key Performance Indicator Business Plan Template
- XYZ 公司 3 年主要业绩指标经营计划
XYZ Ltd 3-Year Key Performance Indicator Business Plan
- 利润潜力表格
Profit Possibilities Spreadsheet
- 环境敏感性练习表
Environmental Sensitivity Worksheets
- “作业成本练习”资源文件包(包括培训邀请函, PowerPoint 演示稿, 员工工作手册, 主持人手册, 培训准备清单和反馈表)
“Activity Based Costing Workshop” Resource Pack (includes workshop invites, PowerPoint presentation, team member workbook, facilitator guide and seminar checklist and feedback form)
- 战略管理会议议程模本
Strategic Management Meeting Agenda Template
- 战略管理会议会议记录模本
Strategic Management Meeting Minutes Template

- 年度战略计划日历
Annual Strategic Planning Calendar
- 文章“战略是一种艺术”。
Strategy as a Craft Article.

典型的模块八程序 Typical Module 8 Program



需完成的任务

Tasks to Be Completed

8.1 平衡记分卡培训 Balance Scorecard Workshop

- 平衡记分卡的作用是将企业的目标转化为一系列业绩衡量。
The Balanced Scorecard is used to translate the business objectives into a set of performance measures.
- 平衡记分卡使企业所有者从四个不同的角度来观察他们的企业：
The Balanced Scorecard presents the business owners with 4 different perspectives from which to view their business:
 - 财务的；
Financial;
 - 顾客的；
Customer;
 - 企业内部的；
Internal business; and
 - 创新和学习的。
Innovation and learning.
- 记分卡共有四张。
There are 4 scorecards in total.
- 每张记分卡上的指标数量是有限的。这样可以保证使企业所有者和经理们关注那些对企业的长期成功和增长真正重要的事情。
The number of indicators on each scorecard is limited. This ensures that the owners and

managers of the business only focus on those things that are really important to the long-term success and growth of the business.

- 平衡记分卡由企业的战略所左右，即，竞争的环境，市场形势和产品/服务的战略等。

The Balanced Scorecard is driven by the strategy of the business i.e. the competitive environment, market situations and product / service strategies.

- 平衡记分卡是根据企业采用的其它基于财务指标的主要表现指标而得来的。

The Balanced Scorecard is used to compliment the other financial based key performance indicators that the business uses.

➡ 请参见[“平衡记分卡研讨会”资源文件包](#)



Please refer to [“Balanced Scorecard Workshop” Resource Pack](#)

8.2 制定 3 年企业主要业绩指标行动计划

Develop a 3-Year Key Performance Indicator Business Action Plan

- 每一个关键的成功因素都应当以 KPI 反映，这样，你就可以不断地衡量企业中真正重要的事情。
Every critical success factor should have associated KPIs so that you can constantly measure the **really important** things in your business.

- 为避免信息过多，企业应当制定和实施一项 3 年的企业主要业绩指标计划。 这项计划正如其名称一样， 包含的只是 KPI。

To avoid information overload the business should design and implement a 3 Year Key Performance Indicator Business Plan. The 3 Year Key Performance Indicator Business Plan is as the name suggests a Business Plan that comprises solely of KPIs.

- 我们设计了一份“3 年主要业绩指标”模本， 以帮助你设计自己的计划---请参见 [“3 年企业主要业绩指标计划。”](#)

We have designed a “3-Year Key Performance Indicator” template to assist you in designing your own – please refer to [“3-Year Key Performance Indicator Business Plan.”](#)



- 我们还为你提供了一份实例样本---请参见 [“XYZ 公司 3 年主要业绩指标计划。”](#)

We have also provided an example to assist you – please refer to [“XYZ Ltd 3-Year Key Performance Indicator Business Plan.”](#)



- 你需要与企业所有者一起召开会议， 向他们解释这个概念， 并开始起草一些 KPI。

You will need to hold a meeting with the business owners to explain the concept to them and to

begin to draft some KPIs.

- 如果可能的话，应当将 3 年 KPI 企业计划进行技术处理。可以采用“仪表板”方法。“仪表板”方法是指，将大部分重要的 KPI 以图示方法在电脑上显示，并与事先确定的基准相比较。

Where possible the 3 Year KPI Business Plan should be technology enabled. Where appropriate a “Digital Dashboard” should be implemented. A “Digital Dashboard” basically means that the most significant Key Performance Indicators are graphically displayed and compared to pre-defined benchmarks on a computer desktop.

8.3 举办“作业成本计算”培训 Hold “Activity Based Costing” Workshop

- “作业成本计算”培训是用来培训企业所有者(和其他相关员工,例如,会计)如何使用作业成本计算方法来分析产品和服务的成本。

The “Activity Based Costing” workshop is used to train business owners (and other appropriate team members, for example the accountant) how to analyse product and service costs using activity based costing.

- 正式邀请企业所有者和管理人员参加培训---参见你的培训资源包中的 [“作业成本计算培训邀请函”](#)。

Formally invite the business owners and management team - refer to the [“Invitation to Activity Based Costing”](#) in your training resource pack.



- 安排地点(尽量使用中立性的地点)和餐饮(上午茶,午餐和下午茶)

Arrange venue (try to use a neutral venue.) and refreshments (morning tea, lunch and afternoon tea).

- 设施---白板, 白板笔, 电脑(用于 PowerPoint 演示), 纸, 笔, 投影仪。请参见你的培训资源包中的[“培训准备清单”](#)。

Equipment – whiteboard, marker pens, computer (for PowerPoint presentations), paper, pens, projector. Please refer to the [“Seminar Checklist”](#) included in your training resource pack.



- 在培训中,你要指导与会者如何实行作业成本计算方法。这种培训只适用于产品范围较大,需要不同水平的人力和工时投入才能完成任务的制造型

企业。

During these sessions you will be teaching participants how to implement activity based costing. This training is only appropriate for manufacturers who manufacture a range of products that require differing levels of overheads and effort in order to be completed.

- 与会者在会上要通过实例分析来了解在他们的企业里如何实施和利用作业成本计算。

During the session participants will be guided through an example that will assist them to how to implement and use activity based costing within their business

- 请参见“[作业成本计算](#)”资源文件包。

Please refer to **“Activity Based Costing” Resource Pack.**



8.4 评估利润潜力

Review the profit possibilities

- 你现在应该与企业所有者和高级管理层一起开会，找出企业改善盈利状况的领域。
You should now hold a meeting with the business owners and senior management team in order to identify immediate areas for profit improvement within the business.
- 为此， 你需要使用“利润潜力”工具。
In order to do this you will need to use the “Profit Possibilities” tool.
- 要求企业所有者把他们的最近一期财务报告带来。
Ask the business owners to bring along their last financial statements.
- 这次会议的目的是确定企业取得成功的最佳途径。
The purpose of the meeting is to establish the best way for the business to achieve.
- 通过使用含有客户数据的“[利润潜力](#)”工具，你应当能够确立出企业增长的最容易实施的战略， 即，
By using the **“Profit Possibilities”** tool with the clients’ figures you should be able to establish the easiest strategy for the business to grow i.e.



- 企业应当瞄准增加顾客(“A”类)数量吗?
Should the business aim to increase the number of customers (“A” class)?
- 企业应当以增加顾客的购买次数(购买频率)为目标吗?
Should the business aim to increase the number of times that a customer repeats their purchase (buying frequency)? or

- 企业应当力图通过加价或增加附加销售来增加每次销售的平均金额吗？

Should the business aim to increase the average value of each sale e.g. by putting up prices or by increasing add-on sales?

- 当你与客户一起讨论不同的情形时，要确保他们对数据的认可。

As you go through the different scenarios with the client, please ensure that you have their commitment to the numbers

- 一旦战略得到确定，要通过头脑风暴寻找实施的办法。

Once a strategy has been decided upon, brainstorm for ideas on implementation.

8.5 环境敏感性分析

Environmental Sensitivity Analysis

- 企业的外部环境必须得到不断的监测，以找出企业面临的机会和威胁。

The external environment of the business must be continuously scanned in order to identify opportunities and threats to the business.

- 必须建立一个环境敏感性分析小组，该小组应由四位员工组成，负责以下四个领域：

An environmental sensitivity analysis team must be established. It should comprise of 4 team members, one for each area:

- 政治/法律；
Political / Legal;
- 经济；
Economic;
- 社会/文化；
Social / Cultural; and
- 技术。
Technological.

- 该小组必须持续地对环境进行监测，以发现机会和威胁。他们应监测的一些内容例如：

The team must continually scan the environment to identify threats and opportunities for the business. Examples of things they should monitor, include:

- 报纸和杂志；
Newspapers and Journals;
- 竞争对手的行动；

Competitor actions; and

➡ 互联网。

The Internet.

- 这些监测内容应当向企业所有者报告，这样，企业战略就可以据此进行必要的调整。

These should be reported back to the owners of the business so that the business strategy can be adjusted as necessary.

- 环境敏感性小组每个月都要交出他们的监测发现。他们的报告要提交给月度战略管理会议。报告的样式包含在“环境敏感性分析练习表”中---请参见“[环境敏感性分析练习表](#)”。

Every month, the Environmental Sensitivity Team must submit back their findings. Their report is tabled at the monthly Strategic Management Meeting. The report is contained within the “Environmental Sensitivity Analysis Worksheets” – please refer to the [“Environmental Sensitivity Analysis Worksheets.”](#)



8.6 实行月度战略管理会议制度 Implement monthly Strategic Management Meetings

- 该会议的目的是跟踪分析企业在实现其宗旨，远景和目标方面的进展。
The purpose of this meeting is to monitor the businesses progress towards its mission , vision and objectives.
- 每次会议前两天， 所有与会者要收到企业会议文件包。
2 days prior to each meeting all attendees must be issued with a board pack.
- 每份文件包应包括:
Each board pack should contain:
 - 会议议程;
Agenda;
 - 环境敏感性分析报告;
Environmental Sensitivity Analysis Reports;
 - 前一个月的财务报告(包括盈亏表， 资产负债表和现金流量表);
Financial Statements for the previous month (including Profit and Loss statement, Balance Sheet and a Cash Flow statement);
 - 预算和实际业绩的比较;
Comparison between budget and actual performance;
 - 3 年主要业绩指标经营计划;
The 3 – Year Key Performance Indicator

Business Plan; and

➤ 平衡记分卡。

The Balanced Scorecards

- 我们为战略管理会议提供了议程模本---请参见“[战略管理会议议程](#)”模本。

We have provided an Agenda template for the Strategic Management Meetings – please refer to [“Strategic Management Meeting Agenda” Template.](#)



- 每次会议之后应当写出包括行动计划的会议记录。我们为你准备了“记录的模本”---请参见“[战略管理会议会议记录](#)”模本。

Minutes with assigned actions should be prepared after every meeting. We have provided a “Minutes Template” to assist you – please refer to [“Strategic Management Meeting Minutes” Template.](#)



8.7 制定年度战略规划日历

Develop the Annual Strategic Planning Calendar

- 到目前为止，企业已经制定了所有的系统，并在有效地运转，现在的任务是建立一种结构，确保企业的“战略”计划的各个方面与企业的系统合为一体。

Now that the business has all its systems in place and is operating effectively a structure needs to be put in place to ensure that the “Strategic” planning aspect of the business is integrated into the business systems.

- 企业必须为战略规划活动确定一个时间安排。
The business must put in place a schedule for the strategic planning activities.

- 每年都必须评估的任务包括：
Tasks that need to be reviewed at least annually include;

- 准备年度预算，包括损益表，资产负债表和现金流量表；

Preparation of Annual Budgets including Profit and Loss, Balance Sheet and Cash flow Statements;

- 评估企业经营战略规划；
Review of Strategic Business Plan;

- 评估市场营销战略计划和市场营销与促销活动日历。

Review of Strategic Marketing Plan and assessment of Marketing and Promotions Calendar

- 评估技术应用计划；

Review of Technology Plan;

- 评估人力资源战略，包括培训需求分析和计划；

Review of Human Resource Strategy including Training Needs Analysis and Plan;

- 评估知识战略；

Review of Knowledge Strategy;

- 评估环境计划；

Review of Environmental Plan; and

- 评估生产计划。

Review of Operations Plan.

- 在“年度计划日历”上安排出每一项评估工作的时间。我们为你提供了一份模本---请参见“[年度战略计划日历模本。](#)”

Schedule each of the reviews on the “Annual Planning Calendar. We have provided a template for you – please refer to [“Annual Strategic Planning Calendar Template.”](#)



8.8 进展监控， 修改和更新行动计划和战略

Monitor progress, revise and update Action Plan and Strategy

- 保持各项措施的持续实施是非常重要的。 企业所有者付出了很大的努力才达到了目前的这个项目阶段， 现在需要保持这个程序的不断前进---即，持续衡量和管理企业的各项活动。

It is so important to keep the process going. The business owners have worked very hard to reach this stage in the program and now they must keep the process going – continually measuring and managing your activities.

- 即使企业战略已经制定， 还是需要对其进行修改。 Even though, a business strategy has been developed, this strategy may need to change.

- 战略管理会议应当帮助你找出影响企业战略的问题。 请参见战略会议会议摘要。

The Strategic Management Meetings should help you identify issues that may affect your business strategy. Please refer back to the Strategic Management Meeting Minutes.

- 行动计划在每一次战略管理会议之后都应当更新。 Action Plans should be updated after each Strategic Management Meeting.

- 好的战略是一个“灵活的”战略，了解这一点是很重要的。 请让企业主阅读文章“[战略的艺术](#)”。这篇文章将帮助他们了解将战略按照所面临的机会和威胁的情况进行调整的重要性。

It is important to understand that a good strategy is a “flexible” one. Please get the business owners to read the “Strategy As A Craft” article – please refer to [“Strategy As A Craft Article.”](#) This will help them to understand the importance of adapting the strategy to respond to



opportunities and threats.

- 最后，记住----你能衡量的事情， 你就能控制!
Finally , remember – ***what you can measure, you can manage!***

注 Notes

本页有意保留空白

This page has been intentionally left blank

注 Notes

本页有意保留空白

This page has been intentionally left blank

注 Notes

本页有意保留空白

This page has been intentionally left blank

注 Notes

本页有意保留空白

This page has been intentionally left blank