

Business Planning and Development

RtB Solutions was engaged by this local private business to provide business and strategic planning advice and to develop systems to assist the Director in managing the business through delegation of responsibilities to key management personnel and re-alignment of Human Resource processes.

As an organisation of approximately 20 staff, the business had understandably never undertaken a genuine strategic or business planning process, so we first worked with key personnel over a period to understand and document the business' core competencies, services and operational processes. We then undertook a market and competitor analysis to define their market position, competitive advantage and strategic opportunities. This SWOT-based analysis allowed the establishment of a meaningful and culturally aligned vision, mission and values statements which have become a driving factor in the organisation's corporate identity.

Drawing from our extensive library of industry-specific outcome performance criteria, we customised a suite of strategic performance indicators to suite this service-based business. Whilst valuable to establish strategic priorities and targets, we understand that small businesses such as this generally do not have the resources available to continuously monitor complex sets of performance metrics, so instead, we implemented a risk-assessment based approach to ongoing performance and management review. The business review process was simply designed such that key management personnel can objectively define current and desired performance and track progression toward goal attainment.

We then identified the key operational drivers and processes that affect outcome performance and worked with the client to establish appropriate operational metrics and improvement opportunities which are documented with the business plan.

To ensure that the business plan could be operationalised, we worked with the client's key staff to re-align the organisational structure and accountabilities, including a complete redevelopment of all manager and team-leader position descriptions.

Following the establishment of organisational performance criteria, analysing current capabilities and the competitive environment and developing a Corporate Performance scorecard, the business plan and management review process was operationalised to guide the organisations development.

The business planning process was conducted in 4 phases as outlined below:

Phase 0 – Initiate: overall management structure, “end state” design and priority

1. **RtB** Solutions and the client clarified performance and risks across the entire business system, identifying short, medium and long-term priorities for systems development
2. **RtB** Solutions provided “template” processes for the core Human Resource processes and agreed on the high-risk areas for resolution and priorities for further development
3. **RtB** Solutions provided an overall human resource management systems structure tailored to the business which covered all functions of the business;

Phase 1 – As Is: Current state – service delivery process

- Conducted interviews and workshops with Service Manager and other key staff to detail all responsibilities and activities currently performed throughout service delivery

- Reviewed existing documentation, position profiles, systems and available data to understand the current situation in full
- Documented current-state processes and workflow, the interaction with information and systems and responsibilities/ roles throughout service delivery
- Validated performance and risks in the current processes and responsibilities

Phase 2 – To Be: Future state design, service delivery controls and transition

- Developed future-state process including roles and responsibilities aligned to activities, interaction with information flow and systems
- Defined key controls, quality check-points, performance measures and reports/ data to ensure control of the service delivery
- Developed detailed recommendations, including adoption of KPI's, adjustments to roles/ responsibilities, documentation of new process and position descriptions and recommended changes/ improvements to systems/ tools

Phase 3. Continuous review and improvement

Our involvement with this client remains and we periodically refer back to them to monitor the execution of their business plan and review its currency considering the changing business and operating environment.

Implementation of the business plan has allowed the Director to relieve himself of many operational duties and instead, focus on organisational development. In a little over 12 months since implementation, this business has expanded market share and been awarded several Local and State Government Standing Offer Arrangement (panel contracts). In addition, pricing has been increased to improve profit margins, whilst remaining competitive. Overall, the business turnover has increased by almost 20% with bottom-line profitability also increasing. Staff and customer satisfaction is now continuously monitored, showing positive improvement trends, matched by the improved internal controls and HR and OH&S systems maturity improvement.

Additional information

As a small business of less than 20 employees, this organisation does not have the resources available to larger organisations to implement complex HR Structures. Through this review, we applied the same logic and discipline that works in larger corporations but scaled it down and customised the systems to a manageable state. The resulting solution has provided this small business with a full management and human resourcing structure and system that is fit-for-purpose, scalable and does not require heavy levels of resourcing to manage effectively. This ability to adapt complex business systems to fit within the local organisational environment is a key capability and differentiator of **RTB Solutions**.

We do not provide *off the shelf* solutions but use the best contemporary theories and systems available to develop site and organisation specific solutions.