

## BUSINESS PLANNING & RESOURCE ALLOCATION OFFERINGS

<p><b>BUSINESS PLANNING AND RESOURCE ALLOCATION PROCESS</b></p>	<p>WLH would conduct an assessment of your current field-based business planning and resource allocation process. Based on the findings, WLH would then leverage its <b>Business Planning &amp; Resource Allocation Framework</b> to customize the process and meet your organizational requirements. Process steps typically include:</p> <ul style="list-style-type: none"> <li>• Understanding critical marketplace trends</li> <li>• Analyzing current and projected future performance</li> <li>• Identifying priority customers</li> <li>• Developing business plans for either a single brand or for a portfolio of products; depending on organizational requirements</li> <li>• Coordinating with key stakeholders</li> <li>• Adapting the process to specific operating unit requirements</li> </ul>
<p><b>SPECIFIC BUSINESS PLANNING AND RESOURCE ALLOCATION PROCESS FOR LAUNCH PRODUCTS</b></p>	<p>WLH can adapt business planning processes and tools for a product launch to:</p> <ul style="list-style-type: none"> <li>• Determine steps and timing required to develop business plans</li> <li>• Modify marketplace assessment analysis based on available analytics and strategic focus</li> <li>• Integrate business planning process into other product launch workstreams</li> <li>• Provide support to both Marketing and Sales to ensure launch readiness and alignment</li> <li>• Involve Managed Markets and other key stakeholders in the planning process</li> <li>• Design any training needed for new managers and sales representatives</li> </ul>
<p><b>BUSINESS REVIEW AND RECALIBRATION PROCESS</b></p>	<p>This process provides managers and their direct reports with a consistent way to review and recalibrate plans based on performance and marketplace conditions at pre-determined periods of time (e.g. quarterly, semi-annually).</p>
<p><b>BUSINESS PLAN TOOLS AND TEMPLATES</b></p>	<p>For each client, WLH will customize tools and templates to match their processes, work within their systems, and leverage existing reporting analytics. Additionally, WLH incorporates input from Legal and Compliance regarding the tools and requirements for execution. Tools are designed to:</p> <ul style="list-style-type: none"> <li>• Synthesize the marketplace review</li> <li>• Conduct a strategic SWOT analysis for the assigned geographic area</li> <li>• Identify and segment priority customers</li> <li>• Provide guidance for customer profiles</li> <li>• Identify resource allocation priorities</li> <li>• Create action plans</li> </ul>

For more information on how WLH Consulting, Inc. can help you with Business Planning and Resource Allocation, please email [wendy@wlhconsulting.com](mailto:wendy@wlhconsulting.com), or feel free to call (954) 385-0770.

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<b>GUIDANCE ON THE USE OF BUSINESS ANALYTICS TO INFORM DECISION MAKING</b>	<p>WLH partners with internal stakeholder to identify the analytics required to assess current performance and future potential. WLH can:</p> <ul style="list-style-type: none"> <li>• Provide training support on how to read and analyze reports</li> <li>• Help identify the key questions and considerations a sales leader and field sales need to ask to identify opportunities</li> <li>• Map out the data analysis steps and how to include key insights in planning efforts</li> </ul>
<b>ORGANIZATIONAL READINESS CASCADE AND LEARNING STRATEGY</b>	<p>Develop an overall organizational cascade and learning solution roadmap to accelerate a common business planning and resource allocation process. WLH can:</p> <ul style="list-style-type: none"> <li>• Outline a cascade that begins with Sales Leaders and includes a specific learning solution for Regional Directors and District Managers</li> <li>• Create a high-level communications plan</li> <li>• Clearly define roles and responsibilities for cascading and providing oversight related to the business planning process</li> <li>• Include customized materials to support the cascade (meeting agendas, presentation materials, participant workbooks)</li> <li>• Prepare leaders for championing and implementing the process</li> <li>• Customize learning workshops and sustainability tools to develop business planning skills and capabilities</li> </ul>
<b>SUSTAINABILITY TOOLS</b>	
<b>PERFORMANCE TOOLKIT</b>	<p>The Performance Toolkit uses web-style technology to put all required content, process, models, templates, and skills at a manager or director's fingertips on their desktop</p>
<b>LEADER-LED LEARNING MODULES</b>	<p>Suite of learning modules facilitated by managers to help teams practice, apply, and continuously improve process and skill mastery, over time, in work-related 30-minute to 1-hour workshops. These leader-Led learning modules will support "pull through" efforts from other workshops and webinars</p>
<b>FIELD COACHING GUIDES</b>	<p>Series of questions/checklists for a manager to ask a direct report to assess knowledge, skills, and capabilities; basis for ongoing coaching and feedback</p>
<b>DEVELOPMENT EXPERIENCES</b>	<p>Suggested on-the-job activities designed to provide individuals with ways to leverage strength or close a development gap related to business planning skills</p>
<b>BASELINE ASSESSMENTS</b>	<p>A custom <b>Business Acumen Competency Assessment</b> based on organizational competencies. This would provide the sales leader with an assessment of key behaviors and skills; allows for targeted skill development in the program and ongoing coaching for follow-up</p>

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