

# Corporate Diagnostic Review



## A RAPID, ANALYTICAL CHECKUP

*Designed to:*

- **Expose problem areas**
- **Uncover issues** that may become problems
- **Identify opportunities** for growth
- **Target initiatives** to improve company performance

*The CDR delivers executive-level insight into the condition of the company at a minimal cost*

# About the CDR

Stanton Associates'

## Corporate Diagnostic Review

A quick and powerful assessment to uncover the risks and opportunities for growth within your company

### The CDR covers 5 key dimensions

#### Sales

- Sales coverage model
- Effective sales process
- Forecasting & pipeline management
- Incentive comp & recognition
- Sales training
- Channel management
- Strategic account management
- Information systems

#### Marketing

- Clearly defined marketing strategy
- Brand health
- Competitive positioning/threats
- Sales & marketing alignment
- Awareness Building Activities
- Lead Generation Efforts
- Marketing ROI
- Customer Satisfaction, Feedback Loop

#### Financial Discipline & Analysis

- Gross margin analysis
- Robust financial model
- Cost management
- Forecasting
- Cash flow optimization
- Working capital management
- ROI-based decision making
- Budget linked to operational plans

#### Performance Management

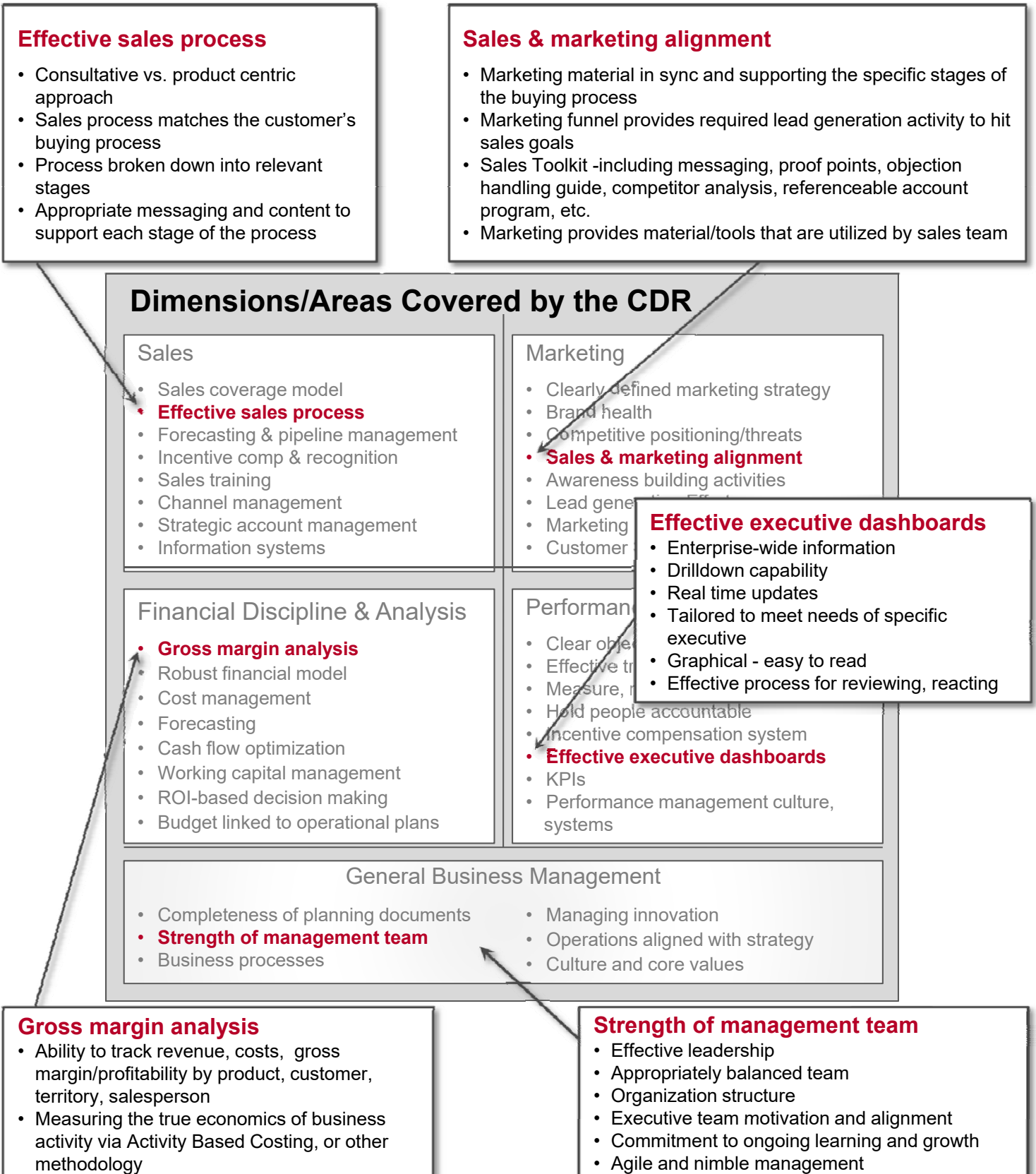
- Clear objectives set at all levels
- Effective training, communication
- Measure, monitor performance
- Hold people accountable
- Incentive compensation system
- Effective executive dashboard
- KPIs
- Performance management culture, systems

#### General Business Management

- Completeness of planning documents
- Strength of management team
- Business processes
- Managing innovation
- Operations aligned with strategy
- Culture and core values

# A Rapid and Powerful Assessment

Each area is assessed along an extensive set of contributing factors.



# CDR Top Level Findings

Example assessment below shows the areas requiring attention.

- Satisfactory to excellent
- ⚠ Caution – potential issues and/or improvement is needed
- ⊖ Significant weakness or threat

## Sales

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- ⊖ Effective sales process
- ⚠ Forecasting & pipeline management
- Incentive comp & recognition
- ⚠ Sales training
- ⚠ Channel management
- ⊖ Strategic account management
- ⚠ Information systems

## Marketing

- ⚠ Clearly defined marketing strategy
- ⚠ Brand health
- ⚠ Competitive positioning/threats
- ⚠ Sales & marketing alignment
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- ⊖ Lead generation efforts
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## Financial Discipline & Analysis

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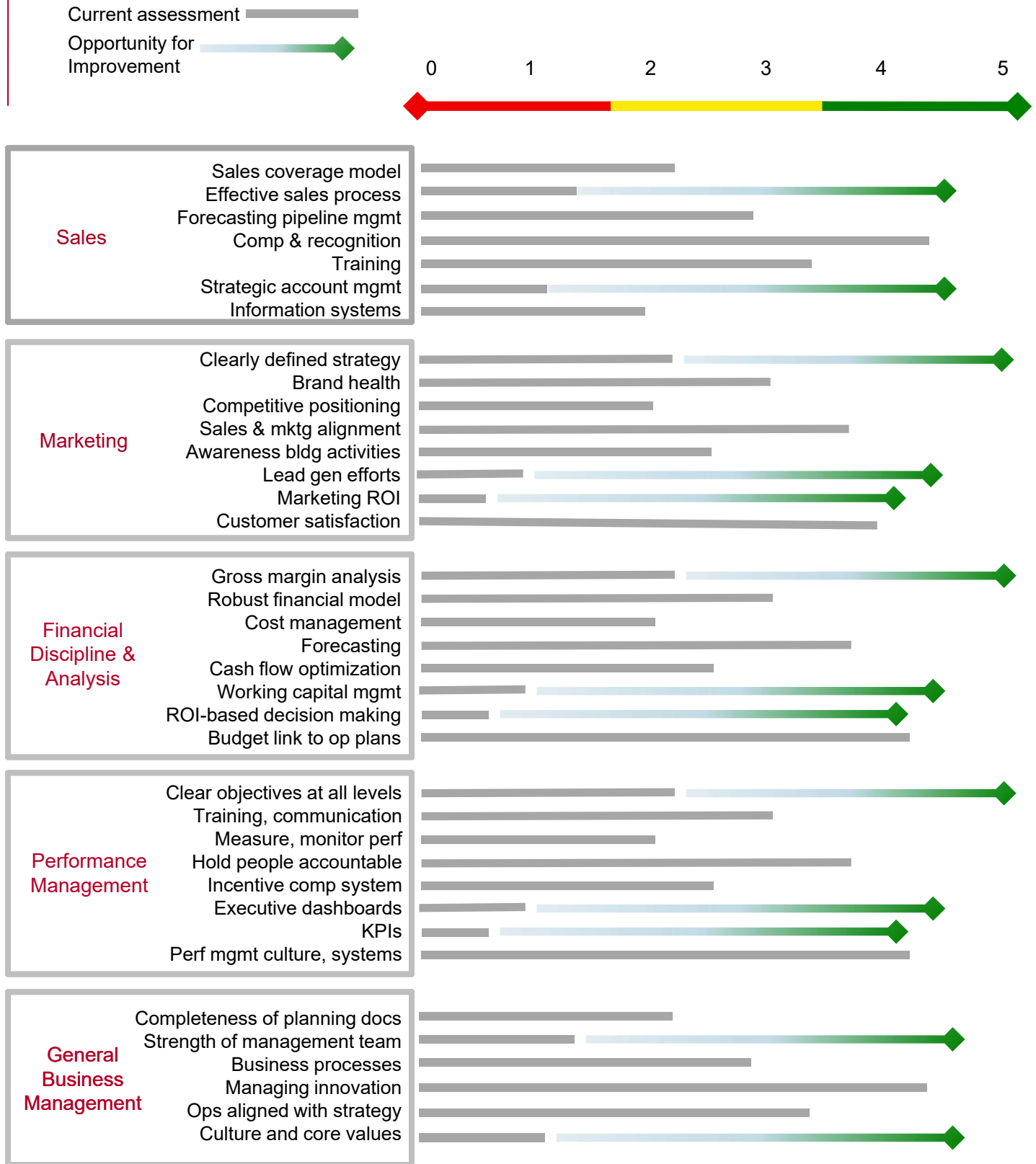
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## General Business Management

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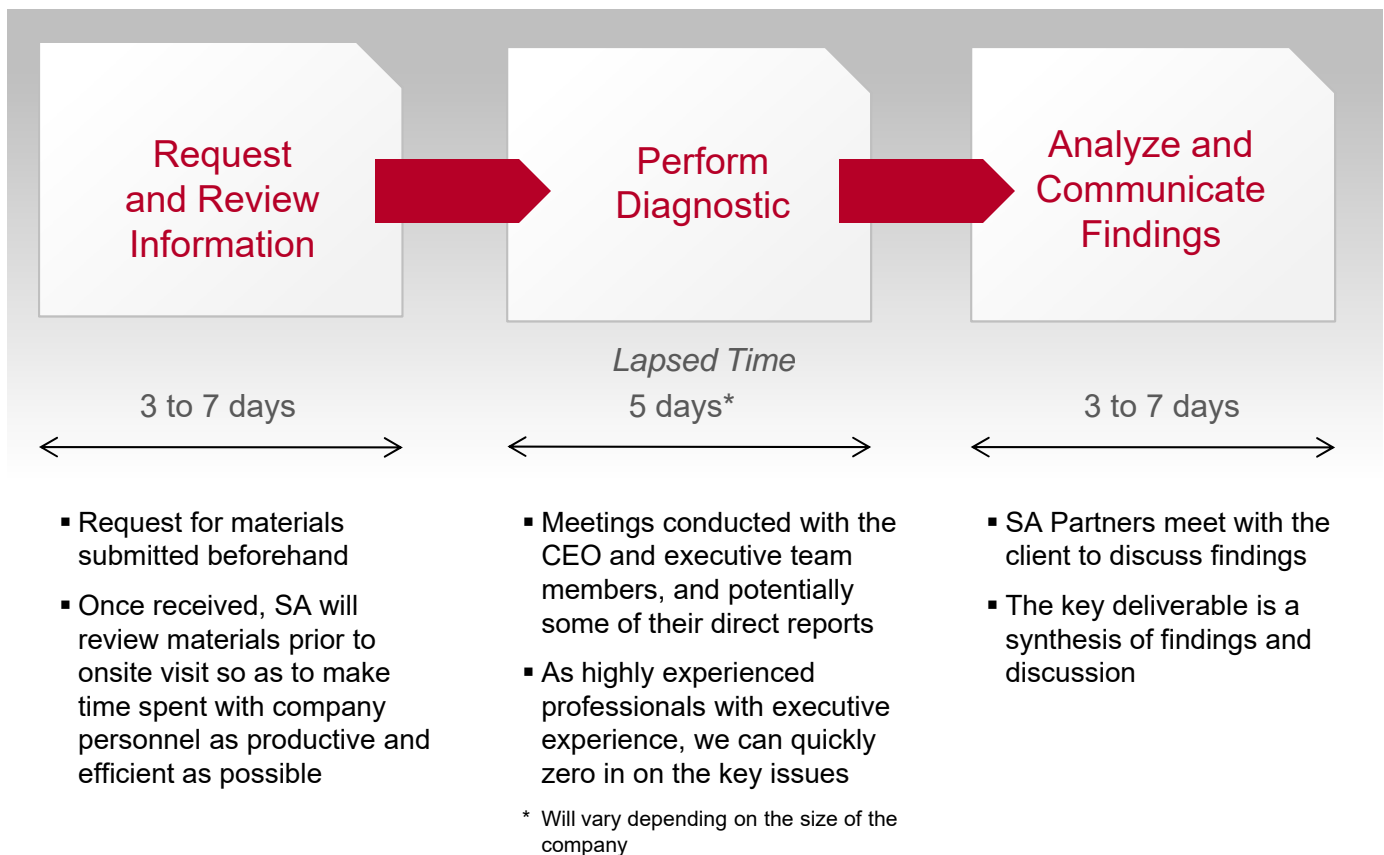
# A Clear View of Where to Focus

Stanton Associates will identify the areas that offer the greatest opportunity.



Note: These ratings are unweighted. Various considerations (e.g., level of effort, cost, etc.) should be taken into account when considering the relative priorities.

# How It Works



## FAQs about the CDR

### When does it make sense to perform a CDR?

The CDR certainly makes sense when a company is facing challenges meeting its revenue and profit goals. But more broadly, as a diagnostic, the CDR offers insight into areas that could later become problems if left unchecked. Also when there is an incoming CEO or change of ownership, the CDR provides quick insight and guidance on setting priorities.

### What's resources are required from the company?

We ask for some materials beforehand. Additionally in-depth discussions of approximately 1 to 2 hours will be conducted with each senior member of the management team and some of their direct reports.

### How long does it take?

The CDR process can take as little as 2 weeks in terms of lapsed time from start to finish.

### How much does it cost?

While the price will vary depending on size and complexity, it can start as low as \$2,000 for a small company --a modest amount for the senior level attention and actionable insight resulting from the CDR. Additionally, the amount you pay for the CDR is applied as a credit towards a future engagement addressing the issues arising from the process. All in all, it's a tremendous value considering the expertise provided by the professionals performing the diagnostic.

### What if I already know where my company's issues are?

We would expect that CEOs have a good sense of where the issues lie. Presumably management has already been addressing what is obvious and, by definition, that has not solved the problem. However, it is so difficult for anyone to step back and take a clear view of one's own company. As independent experts with "fresh eyes" it is almost inevitable that we will find several valuable opportunities. That said, if you know where the issues are and need help fixing them, then we are ready to dig right in on those specific matters.

# Who We Are

## Seasoned Professionals

who have served on the executive side of the desk for both public and private companies.

Former positions held:  
CEO, COO, CFO, Head of Sales

## Extensive Background

at some of the world's greatest companies.

IBM, Andersen, Ernst & Young, Deloitte, PWC

## Broad Industry Experience

with sweet spots in:

Food & Beverage, Retail, Technology, Media & Telecommunications, Manufacturing & Distribution, Business Services, Consumer Products

### Lewis Stanton



**Expertise:** Business Strategy. General Management. Finance and Operations.

**Industry Background:** Technology. Manufacturing. Business Services. Media & Entertainment.

**Experience:** Several time CEO, as well as former COO and CFO of a public company. Former leader on the M&A and Capital Markets teams of Arthur Andersen.

### Chris Woodward



**Expertise:** Finance. Operations. Strategic Planning.

**Industry Background:** Media & Entertainment. Financial Services. E-commerce.

**Experience:** Former top executive of a company that includes real estate, retail, media, casino, and brand licensing businesses. CFO to several media & entertainment and E-commerce companies; Corporate Controller and Divisional CFO, New Star Media, Inc.; Audit Manager, Ernst & Young.

### Tony Davis



**Expertise:** Strategic Planning. Corporate Development. Core Business Operations. Integration of Wireless/Mobile Communications & Technologies. Web 2.0/Social Networking/E-commerce Platforms. Cable and Satellite Media Opportunities.

**Industry Background:** Mobile/Wireless. E-commerce Products. Social & Digital Media and Services.

**Experience:** Several time CEO/COO/President, successfully helping technology, service and product companies in high growth environments.

### Taylor Ganz



**Expertise:** General Management. Operations. Finance.

**Industry Background:** Retail. Consumer Products. Consumer Finance. Aviation Services.

**Experience:** COO of a \$75 million retail store chain with 25 locations. Extensive experience in growing sales and improving operations at underperforming companies.

### Lawrence Johnson



**Expertise:** Strategy. Sales. Marketing & Distribution.

**Industry Background:** Food & Beverage. Food Service. Consumer Products. Financial Services.

**Experience:** Founder and President of a specialty food products company. Former Managing Director, Deloitte.

### Garry Willinge



**Expertise:** Asia/China. Conversational Mandarin. Organizational Design. Leadership. Strategy. Executive Management. Corporate Governance.

**Industry Background:** Technology. Business Services. Manufacturing. Public Sector. Education. FMCG. Property. Retail and Distribution. Energy.

**Experience:** Director, Global Services, IBM China/Hong Kong Limited – full responsibility for the business development and overall management of the consulting and services business in IBM China/HK Ltd.