“Releasing Enterprise Behaviours is what we do …”

The Enterprising Futures Toolkit:

- for Organisations

- for Individuals

The Enterprising Futures Team
TDA Transitions and Learning
Riverside House . 26 Augustus Close
Brentford Dock TW8 8QE
T: 020 8568 2703
M: 07834 604710
www.enterprisingfutures.co.uk

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Contents

- Foreword
- The Options: The Continuum of Enterprise Release
- The Toolkit Matrix
- The Content:

A. Working with Individuals: ‘Be Your Own Boss’
B. Working with Organisations:

1. ‘Be an Enterprising Manager’ - for Core Managers

2. ‘Be Your Own Brand Partner’ - for Franchisees
   Plus organisational support:
   - Future behaviours
   - BDM coaching / facilitation for directors and managers
   - Personal development for managers and teams

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Foreword

This pack sets out to present the key elements of the Enterprise Toolkit developed through case work over the last 20 years.

The 'case work' completed spans working with both individuals and organisations.

A. Our work with Individuals

- 1600 individuals have been helped to transition to self employment / small business start-up through using our 'Be Your Own Boss' Entrepreneur Development 6-Module programme.
- This is supported by a Penguin paperback - 'Starting A Business On A Shoestring' *(Dunn & Syrett):*
  - a personal kit through which individuals can build their own businesses (including a business planning package).
  - access to hundreds of 'trade-specific' business checklists so specific *'What ifs …'* can be done. This helps to evaluate viability and the pre-conditions for success.
  - business planning and accounting services have also been provided to complete the service menu.

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Foreword *(cont'd)*

- This work has taught us how to plan / support individuals through the journey from thinking like 'employees' to thinking like 'employers'.

- Our key insight - built into all our programme content and developed in our facilitation and teaching style - is that, fundamentally, this 'journey and transition' is all about personal change and empowerment. Our work therefore is underpinned by a personal change model and we link this originally to a practitioner / coaching model designed to build confidence and boost self discovery - all of this is described in this package.

- The extra dimension to this approach is provided by our 'enterprise behaviour' profile which provides each individual with a method of understanding and evaluating their personal approach to self employment and small business situations: "forewarned = prepared".

- This profile architecture has been used, in one format or another, by 400,000+ users.

  As a result of all these ingredients we are able both to technically support and also to prepare individuals emotionally to face the challenges that accompany an enterprise lifestyle.

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Foreword *(cont'd)*

- In summary, our experience and learning highlight that the enterprise transition from working for someone else to working for yourself is essentially all about personal accountability, maturity and empowerment.

  We have created a learning and coaching process to reflect this. It is also about the acquisition of new skills, knowledge and behaviours - we have plotted this content in such a way that it can be passed on through a combination of facilitation, teaching and coaching.

  It is our belief that more people can do this but it does require a dual process of emotional development as well as the development of commercial and enterprise capability:

  - this is not new thinking
  - this represents best practice
  - it works when done this way

- A particular point about content is worthy of making:

  - the majority of it is timeless
  - some needs updating e.g. accounting / tax guidelines.

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Foreword *(cont'd)*

- With the clever use of IT it is now possible to put content on-line and to personalise the content to meet different people's needs.

- The concept of an 'Enterprise Academy' through which individuals can get immediate content and also have access to others in similar environments is also something that is highly beneficial for both practitioners / coaches and for those who have gone self-employed.

- Our work with existing businesses (SMEs) is not covered in this presentation but please see - "Supporting SMEs - A Fresh Approach".

Please see Part A of this presentation for 'Toolkit' information on the points made.

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Foreword *(cont'd)*

B. Our Work with Organisations

Our work with large organisations has created two programme options, dependent on the objective set:

- **Objective 1: To help managers and their teams become more commercial and adjust to a more commercial environment**
  e.g. National Grid, Devon County Council (Property Team), Lloyds Bank (Training Function) and National Westminster Bank plc.

  In all cases we used our 'Be An Enterprising Manager Programme' and linked this to a change management and transition introduction and coaching process.

- **Objective 2: To support a client in the creation of a Franchise conversion proposition which would run in parallel with a core employed business**
  e.g. Thresher, Boots Opticians

  In this case we used our 'Be Your Own Boss' Programme (but converted to a branded title such as 'The Joint Venture Franchise Programme', or 'The Brand Partner Programme') as the basis for a bespoke Franchise programme (including a bespoke simulation and a bespoke behavioural profile). In the PO scenario we would advocate the term 'Be Your Own Brand Partner' or 'Be Your Own Boss'.

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Foreword *(cont'd)*

For the Franchisor we created the complete process in which the Branch / Store programme would work - this 'Jigsaw' package provided everything necessary to integrate enterprise behaviours within an agreed commercial process.

(If a client then wanted to take the Enterprise elements - the new behaviours / content and process generated for the franchise programme - and put them to work in the rest of the business, we would simply 'lift these' and put them into a bespoke 'Be an Enterprising Manager Programme'. Logically, as part of this, we would recommend a new incentive plan to reward the higher results obtained from the release of enterprising behaviours.

- In summary, as with our work for individuals, we have created a general menu (see Content described later) which we deploy to be used to achieve different briefs. All the ingredients can be customised and all would be delivered and embedded using a common Personal Change and Learning model. The overall steps involved to prepare and deliver everything merge three important areas:

  - Commercial / Financial / Business Planning - to provide commercial skills
  - Simulation expertise and content - to accelerate enterprise learning
  - Behavioural - to ensure future enterprise behaviours

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Foreword *(cont'd)*

- As with our individual work, we have come to realise that the 'individual journey' of transition needs to be accompanied by a parallel 'organisational journey':

  - to learn how to release and trust ...
  - to learn how to find fresh ways to manage the new relationship
  - to learn how to become a coach and facilitator so that empowerment can happen at local level.

The materials that follow provide the supporting information to explain the content described.

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

The Options: The Continuum of Enterprise Release

Individual Enterprise Release

Brand Partnering (Franchising): Balancing Brand Stewardship with Enterprise Release

Corporate Enterprise Release

Business Development Manager and Enterprise Team Programme "Coaching / Learning" based

Change / Transition Relationship Strategy and Plan "Future Behaviours" based

Leadership / Management Role Programme "Coaching / Learning" based

"Be Your Own Boss": 6 Modules

1. Self Employment and You: goals and objectives
2. Business creation and creative marketing
3 Winning business and growing customer relationships
4. Doing it - resourcing and operating
5. Business plan validation
6 Securing financial independence

"Be Your Own Brand Partner"

Bespoke to the Franchisee deal operating under a Franchise Agreement - for Franchisees and their teams

Import those elements suited to encourage enterprise

Bespoke for Core Business Managers operating under an Incentive Model

"Be An Enterprise Manager: 5 Modules

1. Managing the business commercially
2. Taking the marketing / sales initiative
3. Exceeding customer expectations
4. Maximising operating efficiency
5. Taking the team with you

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Toolkit Matrix

Situation	Programme Content	Consulting Process	Deployment
■ Individual Release:	'Be Your Own Boss' including Personal Development and Business Development Modules	X	Direct by the EF/BE Team
■ Brand Partnering:	'Be Your Own Brand Partner' + - Transition/Change programmes for Directors / Managers - Future Behaviours - Coaching and DYP for BDMs	Franchising Jigsaw Model - Individual and - Organisational elements	Direct by the EF/BE team and then selective Train-the Coach / Facilitator / Manager Models
■ Corporate Release:	'Be An Enterprising Manager' + the above	Intrapreneuring Process	As above

ENTERPRISING FUTURES © Enterprising Futures

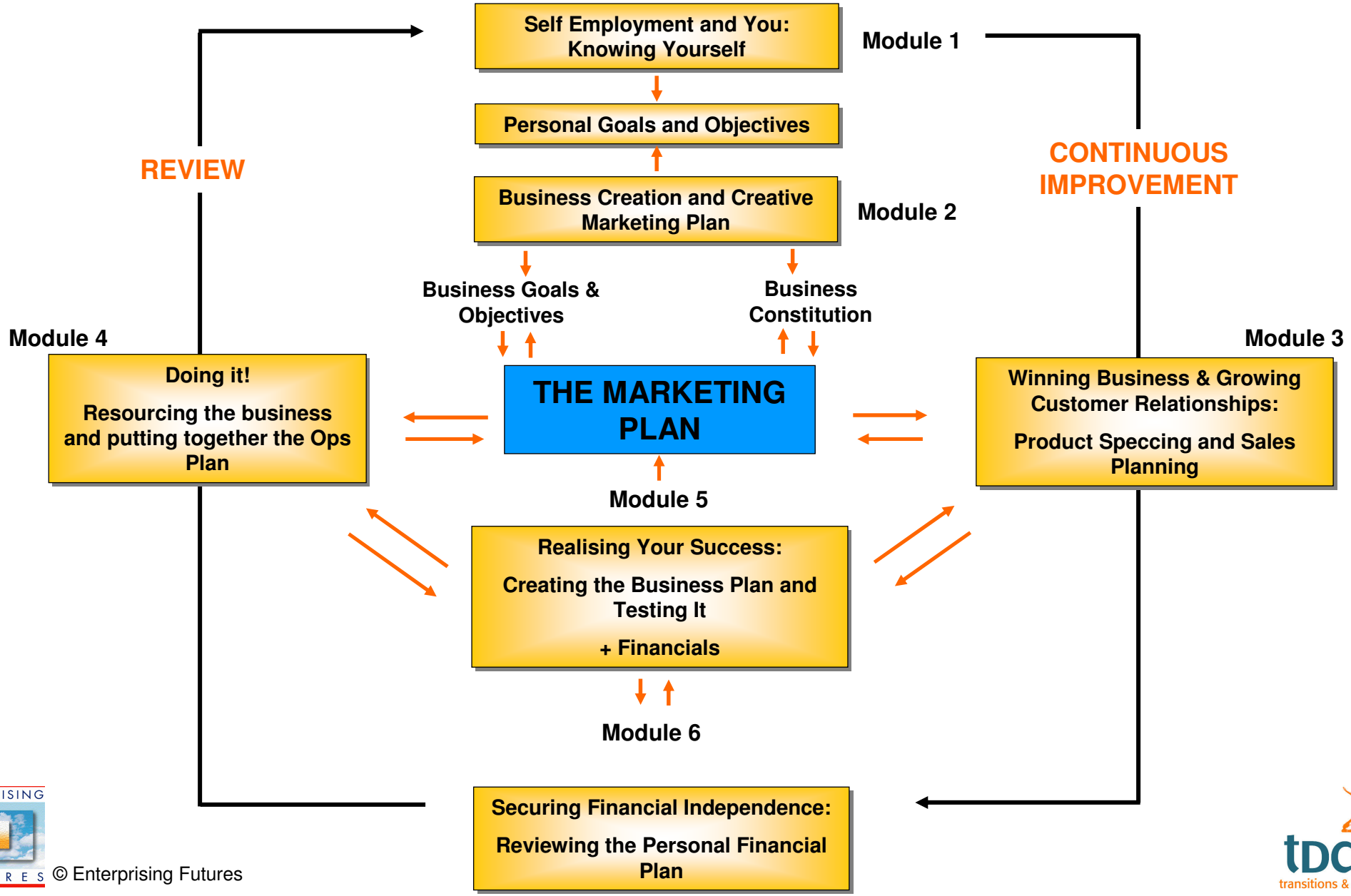
tda transitions & learning

Toolkit Content

The Detail ...

© Enterprising Futures

A. The 'Be Your Own Boss Enterprise Development Programme'



© Enterprising Futures

‘Be Your Own Boss’: Programme Content

Pre-work - Enterprise Behaviour Profile completed

- **DAY 1: Starting A Business: The ‘A to Z’ of Business Start-up**
  Constitution, taxation, operational issues, book-keeping and accounts, paperwork and the selection and briefing of advisers, VAT / NI and other related matters.

- **DAY 2: Running A Business via the ‘Start-up*’ Simulation**
  Margin versus mark-up, reasons for falls in GP, putting a strategy together (personal and business objectives), linking the strategy to a business plan - playing out the simulation and reviewing learning points.

  *(*Generic simulation)*

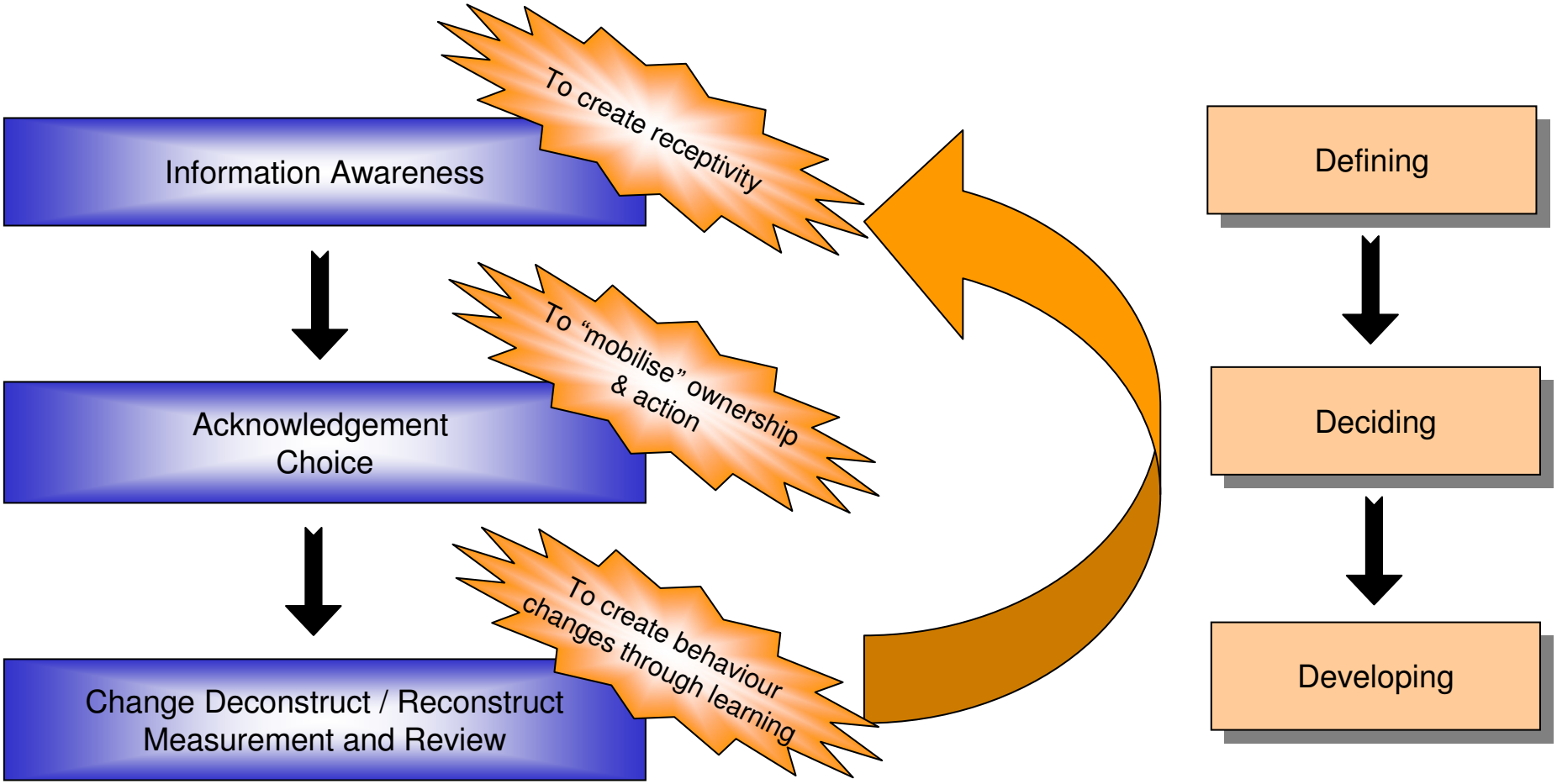
- **DAY 3: Growing a Business**
  Putting together a business plan and presenting it, time management and resourcing of the business, market analysis, marketing process and marketing strategy, building customer relationships, pricing and business terms and other business considerations.

Post work: - Business Plan preparation
- Coaching and advisory support meetings

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

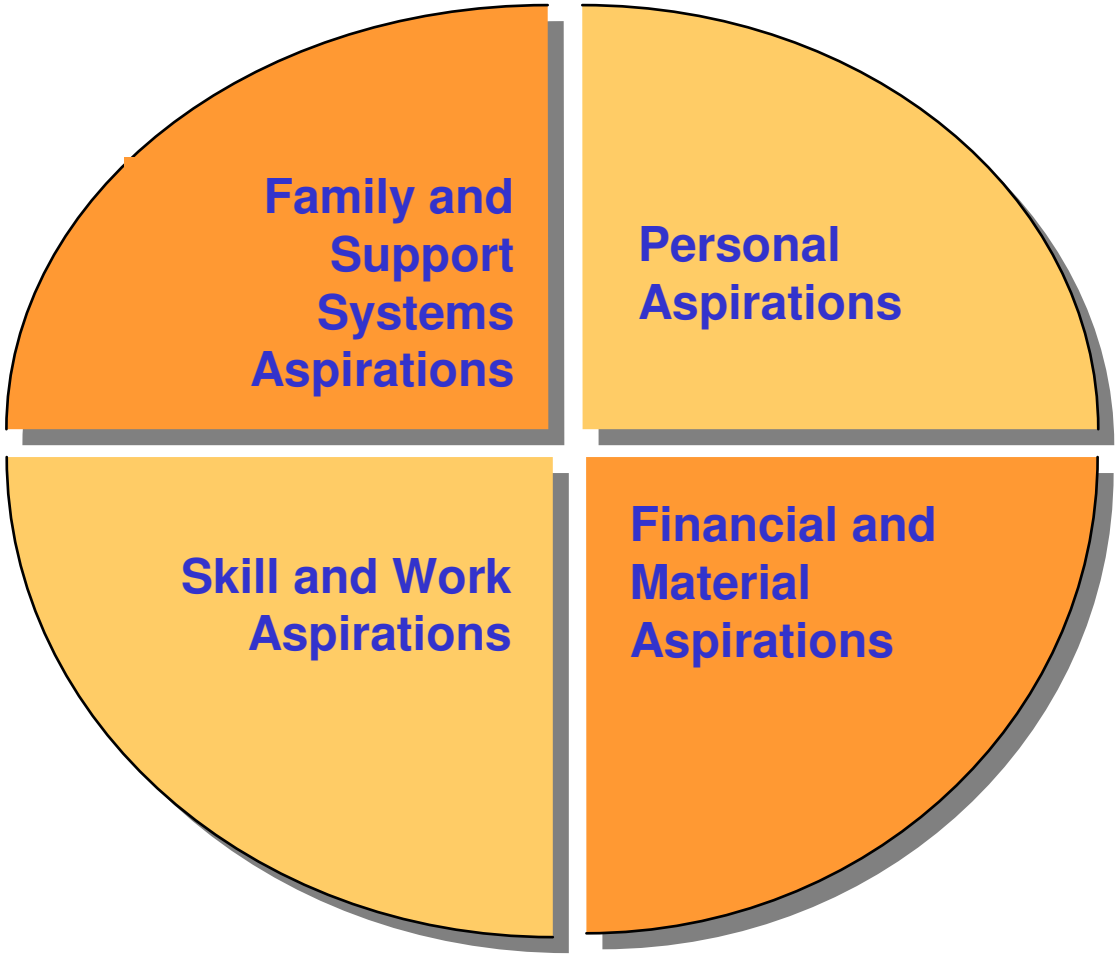
The Personal Change Model and how it supports the enterprising learning process



We use this process to integrate commercial and emotional development

© Enterprising Futures

Setting Personal Objectives that fit with the Business

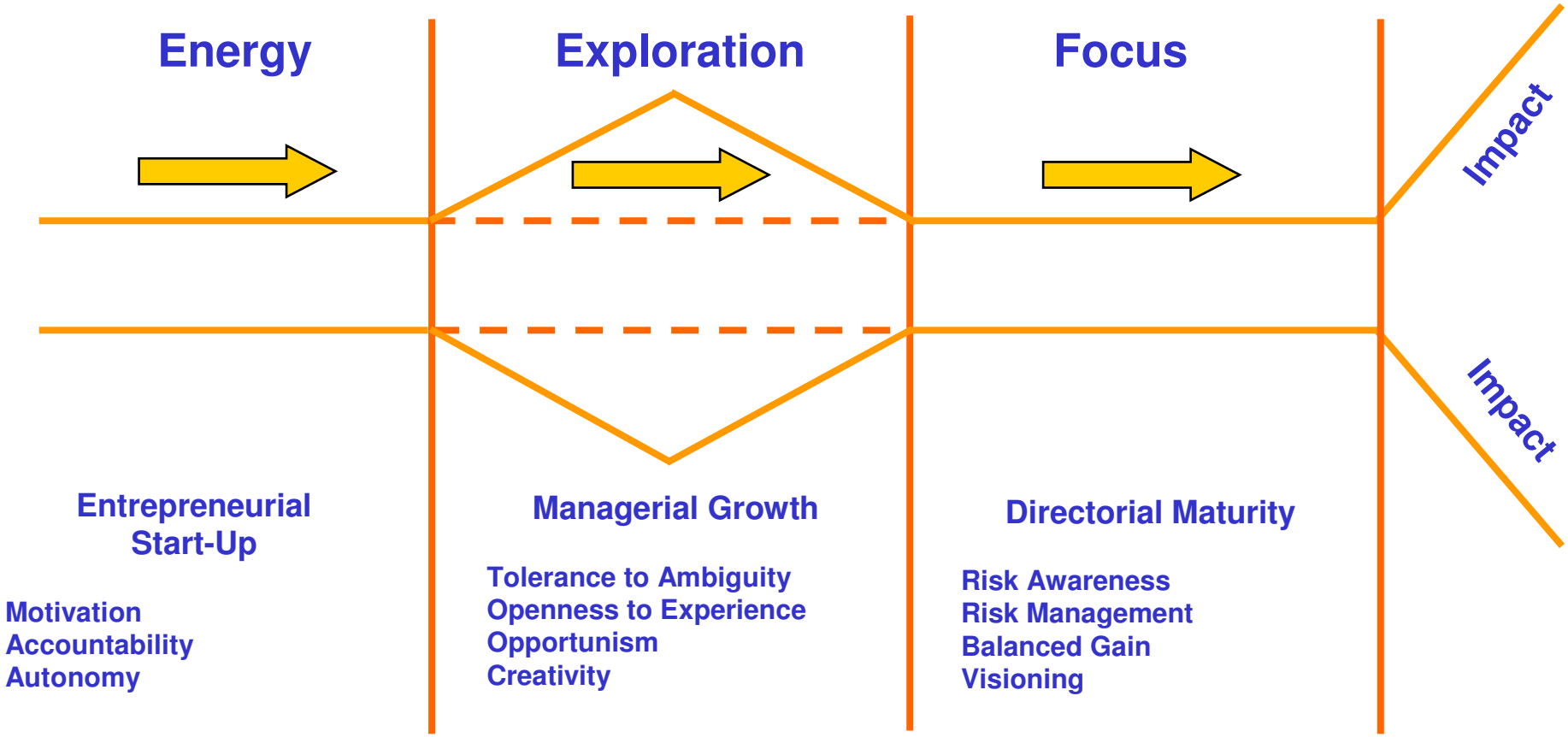


We use this model to support the development of a personal and business vision that is realistic and balanced

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

The Enterprise Behaviour Model



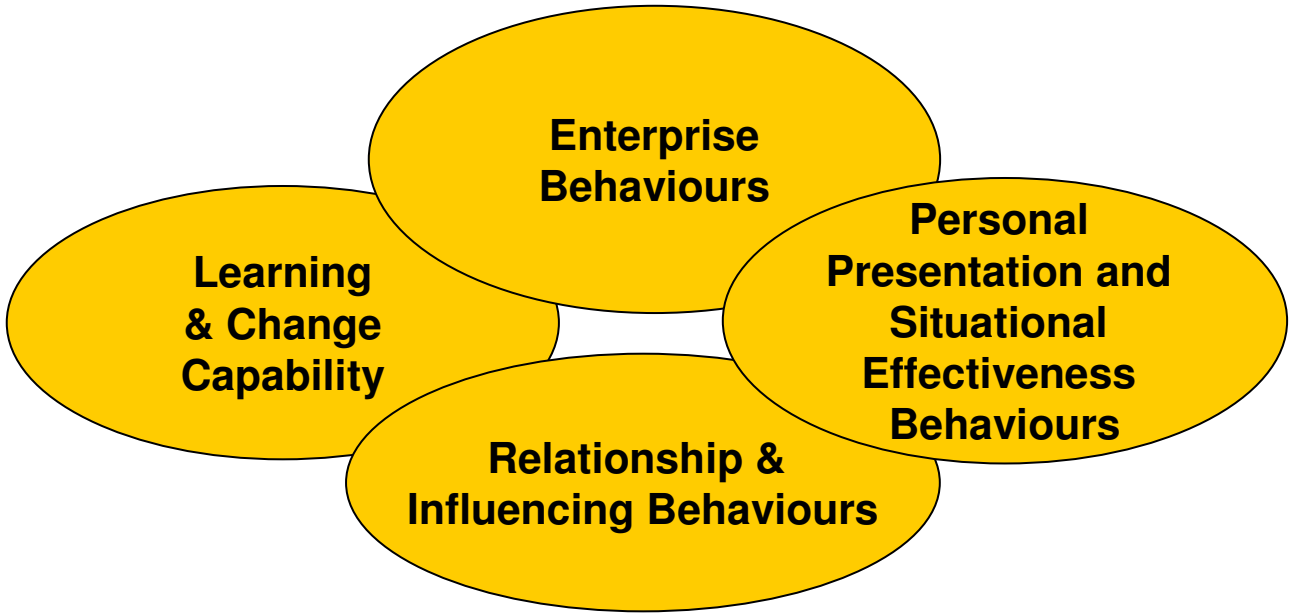
We use this model to provide enterprise behaviour feedback

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Developing Personal Capability

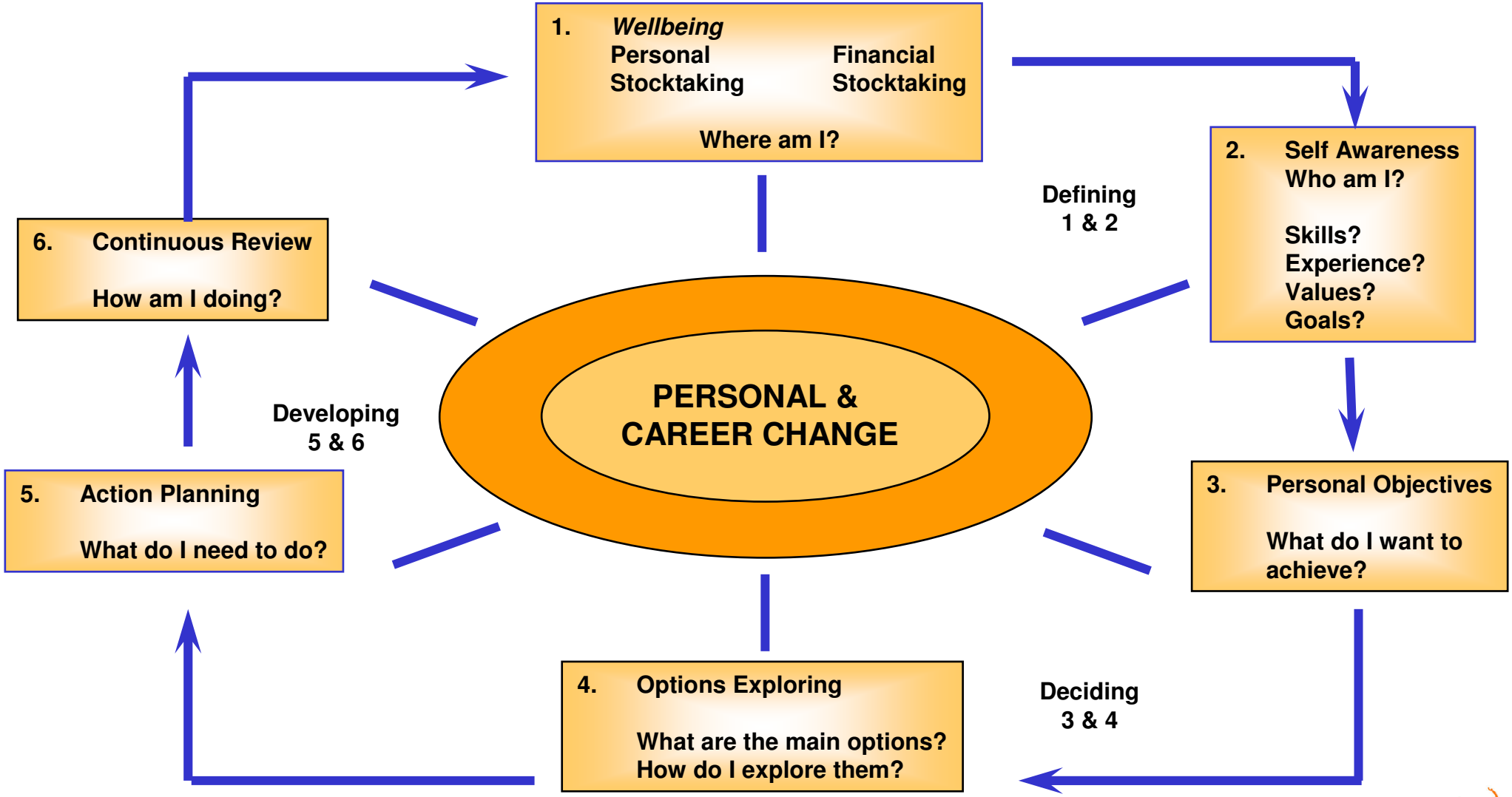
This model underpins a complete Toolkit and coaching process entitled - 'Developing Your Potential'



We use this model to build resilience and underpinning independence and personal effectiveness skills and knowledge

© Enterprising Futures

Developing Personal and Career Transition Skills and Knowledge



This process, which can be repeated many times, is used to integrate all the personal information collected into one decision-making model

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

B1. ‘Be An Enterprising Manager’

A Skills / Knowledge / Behaviours
Module Pack

~ To be used as a customising template
~ To be used to link KPIs and learning

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

'Be An Enterprising Manager'

***5. Taking the Team with you**
- *Project management skills*
- *Resourcing management skills*
- *Time and priority management skills*
- *Commercial and finance skills*
- *Negotiating and broking skills*
- *Customer service skills*
- *Creative problem solving*
- *Marketing and selling skills*
- *Account management*

1. Managing the Business Commercially

Winning profit targets

1. Managing the Business Commercially
- *Brand statement*
- *Service and core proposition*
- *Mission / values*
- *KPIs*
- *Service / product mix and pricing*
- *Competitive analysis*
- *Marketing needs, perceptions and satisfaction*

4. Maximising Operating Efficiency

Winning productivity targets

***5. Taking the Team with you**

Winning new skills

2. Taking the Marketing / Sales Initiative

Winning profitable revenue and achieving competitive edge

4. Maximising Operating Efficiency
- *Project management*
- *Activity planning / resource*
- *Process efficiency*

3. Exceeding Customer Expectations

Winning customer loyalty and respect

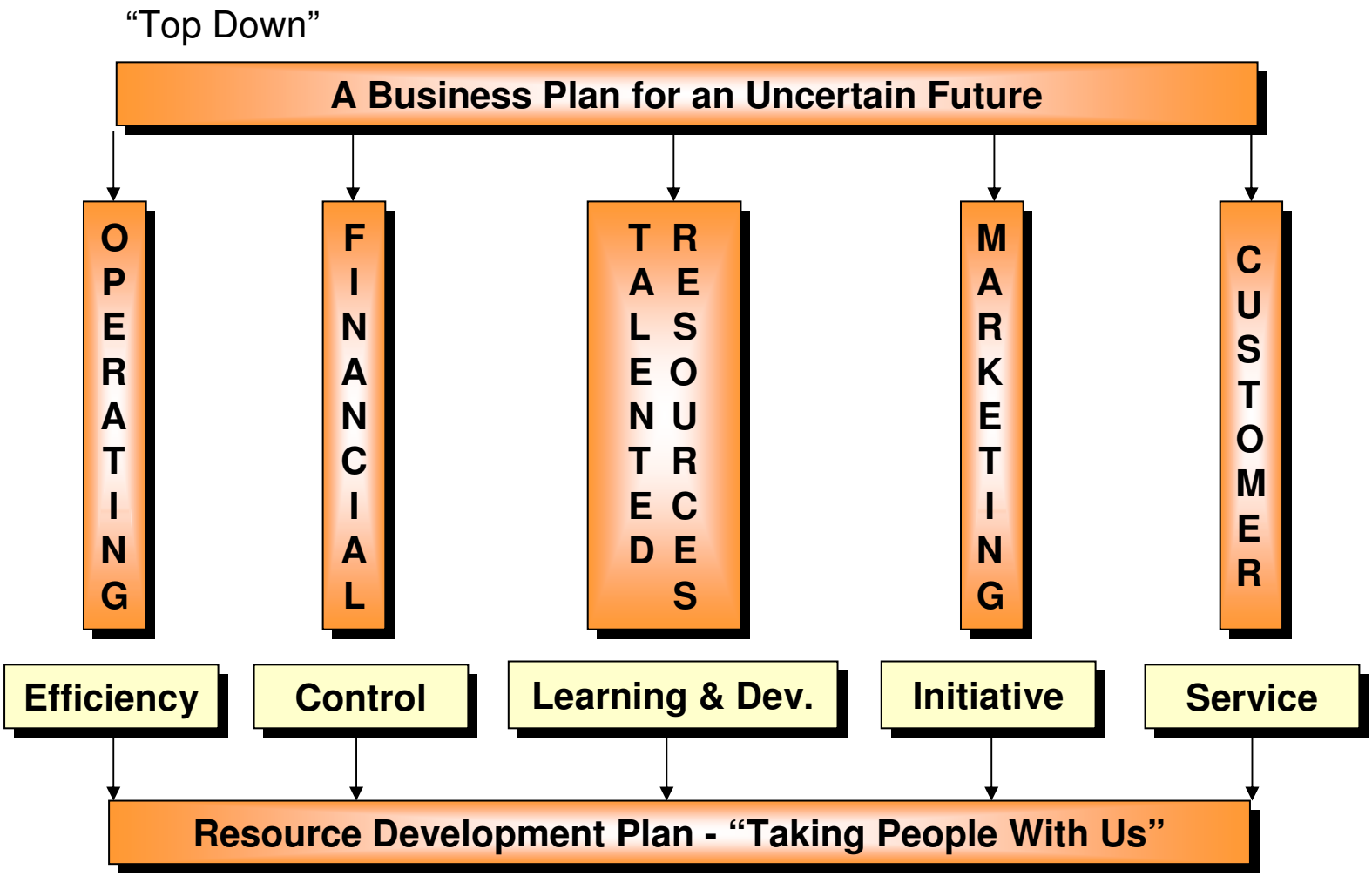
2. Taking the Marketing / Sales Initiative
- *Business planning and targeting*
- *Sales forecasting and account management*
- *Activity planning*
- *Personnel costs analysis*
- *Direct / indirect cost analysis*
- *Gross profit forecasting*
- *Profit / loss account assessment*

3. Exceeding Customer Expectations
- *Identifying needs*
- *Tracking relationships*
- *Managing feedback*
- *Developing client relationships*
- *Improving response times*
- *Measuring customer satisfaction*
- *Continuous process improvement*
- *Achieving delighted customers*

ENTERPRISING FUTURES © Enterprising Futures

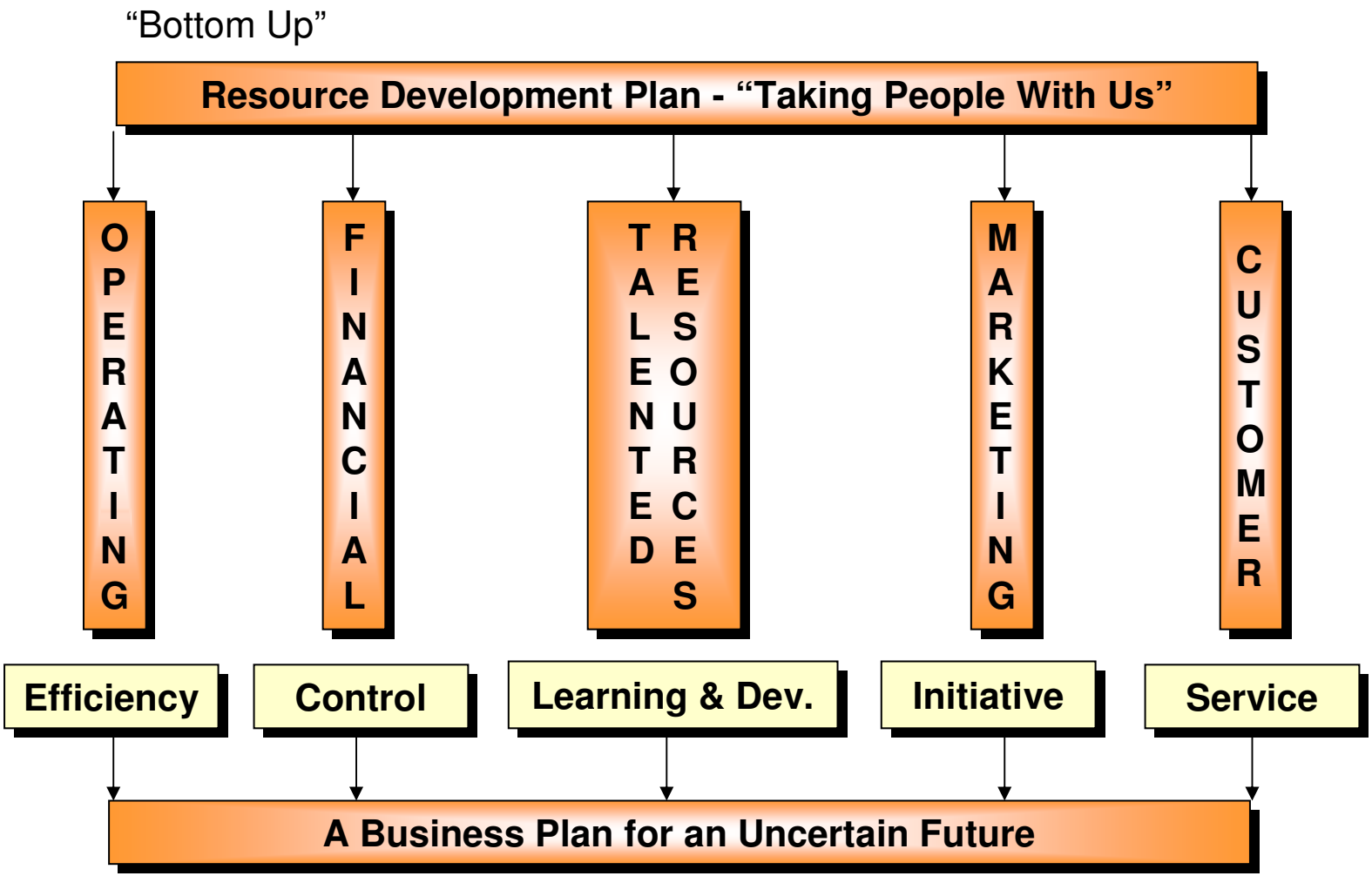
tda transitions & learning

Outcomes: A Modular Approach



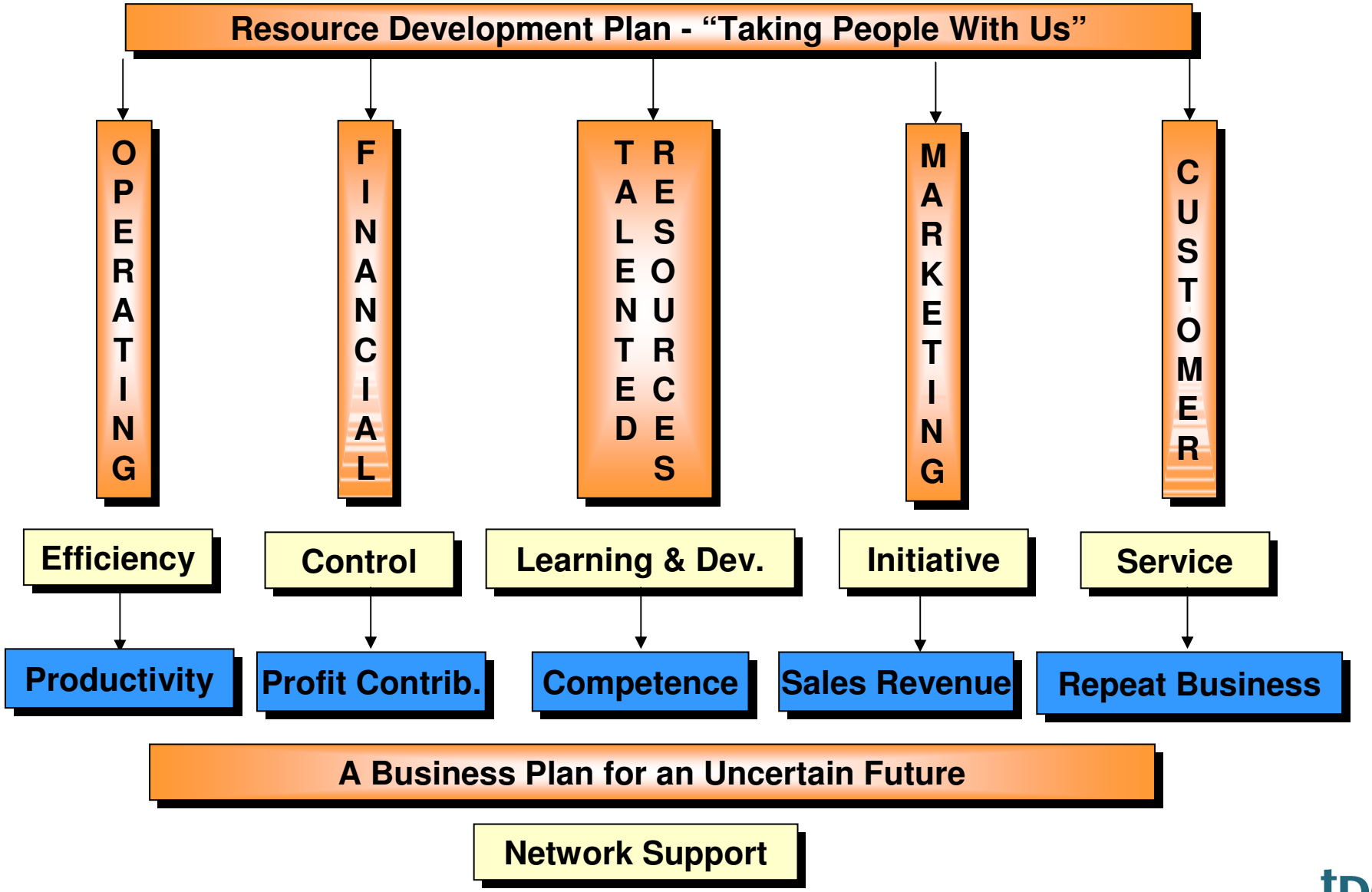
© Enterprising Futures

Outcomes: A Modular Approach



© Enterprising Futures

Key Result Indicators (KRIs)



ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

What's involved in the ...

Operating Efficiency Modules

Transfer of Technology

- Time Priority Management
- Activity Planning
- Resource Management
- Project Management
- Process Mapping
- Process Re-engineering
- Measurement of KRIs
- Outcome

- Team Building
- Change Management
- Improvement Project Process
- Meetings Process
- Feedback Systems

→ **Improved Productivity**

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

What's involved in the ...

Financial Control Modules

Transfer of Technology

- Forecasting Sales Revenue
- Forecasting Operating Costs
- Managing Overheads
- Pricing Projects
- Margin Improvement Techniques
- Constructing the Profit and Loss Account
- Constructing the Balance Sheet
- Outcome

- Contingency Planning
- Cost Reduction Techniques
- Defining Gross and Net Profit Margins
- Pricing Time

→ **Improved Profit Contribution**

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

What's involved in the ...

Marketing Initiative Modules

Transfer of Technology

- Analysing Market Trends
- SWOT Analysis
- Branding and Market Positioning
- Presenting the Service Range
- Managing the Customer Interface
- The Account Management Process
- The Customer Database
- Selling and Consultancy Skills
- Outcome

- "It's OK to Sell"
- Winning Service Level Agreements
- Winning New Business:
  - from Existing Customers
  - from 'New' Customers
- "Making that Proposal", Public Tenders
- Conducting the Customer Review
- Presentation and Negotiation Skills

Improved Sales Revenue

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

What's involved in the ...

Customer Service Modules

Transfer of Technology

- **CUSTOMER SATISFACTION**
- Identifying Service Needs and Wants
- Tracking the Relationship
- Managing the Feedback
- Customer Events
- Separating Local from Central Initiatives
- Improving Response Times
- Building Long Term Relationships
- Outcome → **Repeat Business** →

- **EMPLOYEE SATISFACTION**
- Identifying Employee Needs and Wants
- Building a Success Culture
- Recognition and Reward
- Team Meetings
- Building Loyalty
- Building Advocates
- Outcome

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

What's involved in the ...

Talented Resource Modules

Transfer of Technology

PEOPLE DEVELOPMENT

- Taking People With You - Managing Change
- Map of Crucial Skills / Behaviours and Knowledge
- Delegation; "Manager as Coach"
- Life Planning, Stress Management
- Coaching and Mentor Support
- Competence Development
- Training Needs Analysis
- Learning Process and Methodologies
- Outcome → **Competence** →

SYSTEMS SUPPORT

- Employee Database
- Personal Development
- Assessment and Reward
- Customer Database
- Time Recording Systems
- Project Management Package
- Business Management Package
- Outcome

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

B1. 'Be An Enterprising Manager' ~ Organisational Building Blocks

- To ensure that the programme is embedded and rooted into the business we would typically advocate that, before programmes are run, at minimum the following actions are completed;

  - A 'Futures Behaviour' template and profile is constructed with the help of the Board and key reports. This provides the context for the new environment that is envisaged and provides an anchor point for all future discussions. Typically this would be positioned as part of a Corporate Presentation which gives the rationale for adopting the Enterprise Manager approach and would, typically, also launch / 'trail' other organisational changes in: reward / recognition, organisational structure, reporting lines and communications
  - Core materials exist for all of the items referred to and have been used in a variety of client scenarios, examples include:

~	BAT Holland	-	Top Team and Managers
~	Rothmans / BAT UK	-	Top Team and Managers
~	British Airways	-	Manager / Professionals
~	London Electricity Board	-	Manager / Professionals

The two core models referred to are shown overleaf: ***The Agenda For Change*** (The What and How of Change) and ***Managing Transition*** (the practical steps and behaviours relevant to handling change successfully).

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

B1. 'Be An Enterprising Manager' ~ Organisational Building Blocks

- A Change / Transition Relationship Strategy is also agreed by the Board and published. This sets out the future ways of working - all designed to encourage enterprise and release potential. This would be created as a result of two types of workshop with both Directors and Managers.

  - **Workshop 1 (for Directors):**
    - 'Making Change Happen' (the Agenda for Change)
    - 'Managing Transition' (Travelling Through White Water)

  - **Workshop 2 (for Managers):** *Ditto*, but more operational and inviting practical implementation suggestions

- Finally, we would also typically expect to train Directors / Managers in coaching and facilitation skills so that the new management style (using the agreed behavioural template) could be embedded 'daily' into the organisation.

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

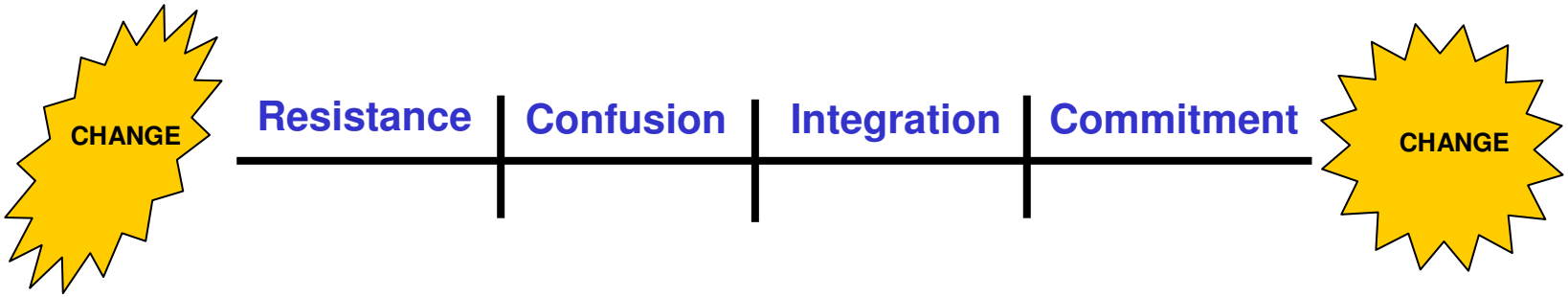
Agenda for Change

1. Create a direction
2. Gain ownership and understanding
3. Encourage Initiative
4. Empower the front-line
5. Gain Network Support
6. Awareness, maintenance and review

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Travelling Through White Water



Acknowledgement: This model is taken from 'Travelling Through White Water' (Fisher & Kennedy).
Enterprising Futures has developed its own insights gained from case work.
We have moved these into a Transition and Change Model.

© Enterprising Futures

B1. ‘Be An Enterprising Manager’ ~ Organisational Building Blocks

- To design a complete client blueprint we would typically use a consulting process similar to the one overleaf: ***‘Intrapreneuring - Creating An Enterprise Culture.’***

  Typically we would start with the Top Team and then cascade down through their immediate reports and then on via the Management population.

  There is not just one way to do this and each client scenario is different.

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

Intrapreneuring - Creating an Enterprise Culture

PHASE 1:

Data Collection

Personal - Needs / Achievements

Core Markets
Mission / Vision
Brand
Achievement

Services / Products
Customer Profiles
Resources
Success Measures

Role
Lifestyle
Business

Top Team Facilitation

WORKSHOP (3 Days)
Business Simulation
Strategy / Direction / Marketing
Business Planning
Managing the Business
Directing the Business
Formating the Business

PHASE 2: TOTAL TEAM INVOLVEMENT

Action Plan

Data Collection | Projects | Communications

PHASE 3: TOP TEAM AND FULL TEAM

BUSINESS PLAN WORKSHOP (2 Days)
Sales
Cash Flow / Overheads
Profit & Loss
Balance Sheet

PHASE 4:

BUSINESS PLAN REVIEW PROCESS
Finance | Marketing | Commercial | Organisation

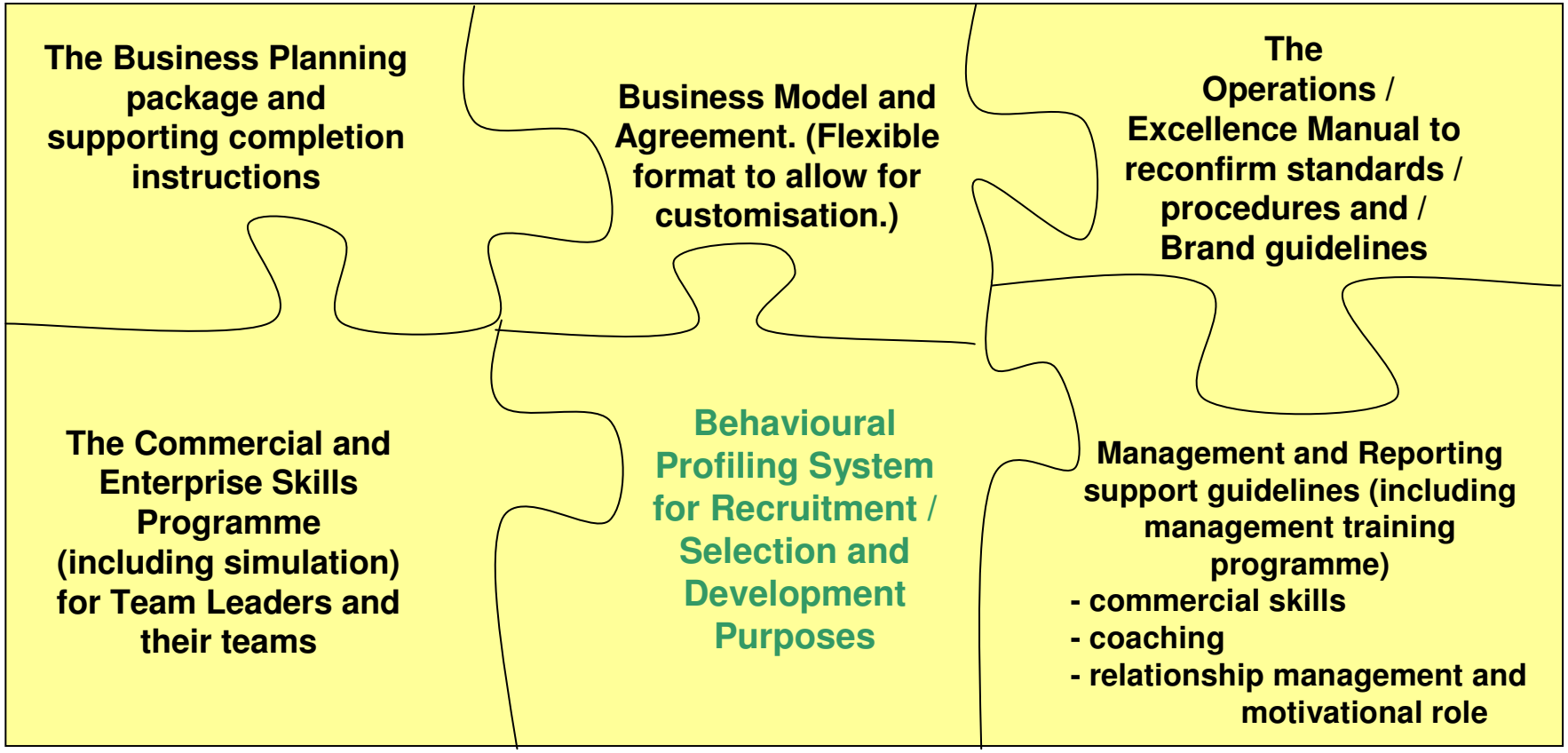
On-going Business Development

'5 DIALS'
- Business
- Team
- Personal Development Modules

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

B2. ‘Be Your Own Brand Partner’

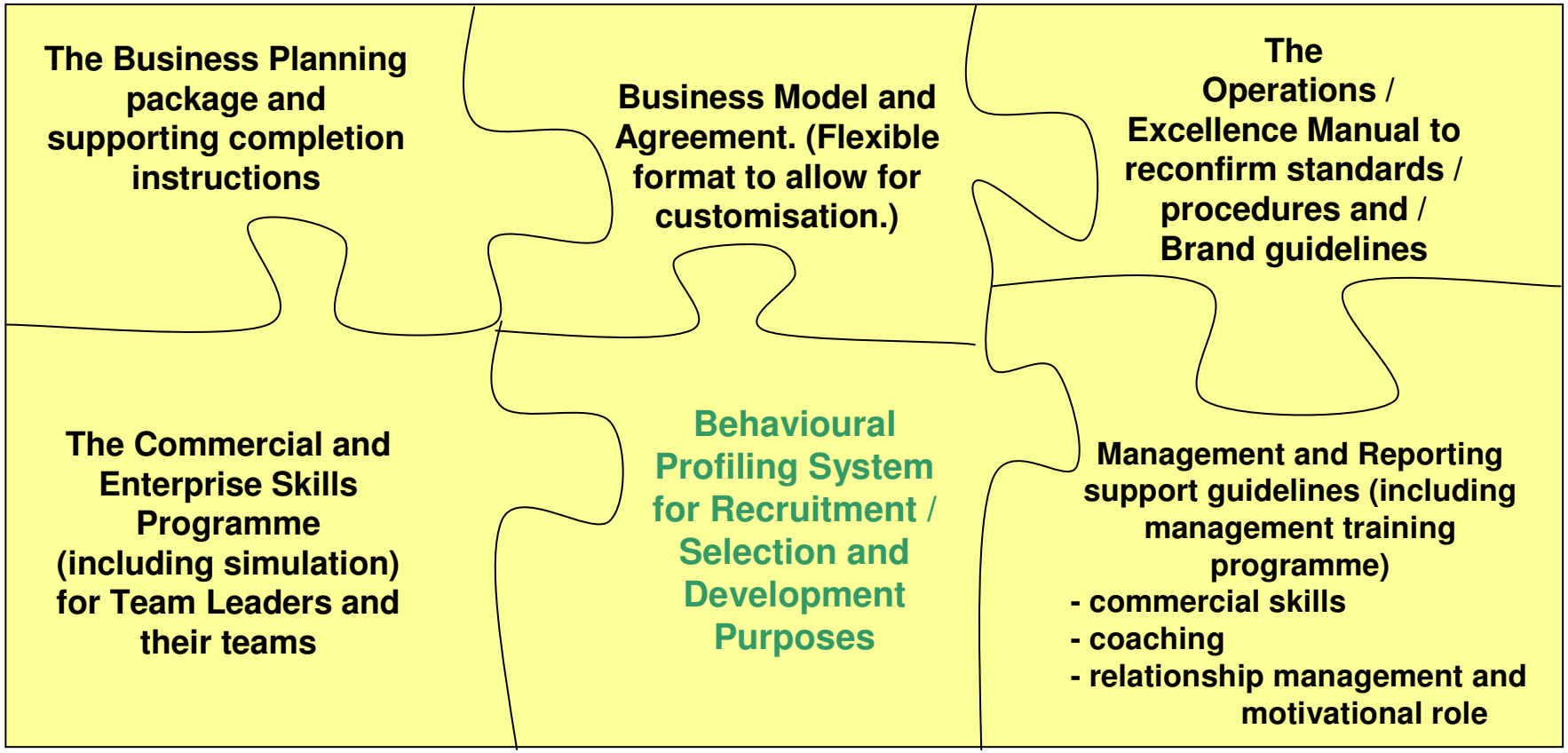


The Individual Solution: To create the bespoke Franchise / Brand Partner process and programme, we:

- Design the Behaviour Package (profile and recruitment process)
- Design the Business Planning Kit and Presentation Process
- Design all the Development Materials, including the simulation
- Implement a completely integrated Personal / Business / Commercial / Enterprise Process

© Enterprising Futures

B2. 'Be Your Own Brand Partner'



The Organisational Solution: We would design the organisational blocks as for the 'Enterprising Manager Programme:

- Futures Behaviour Profile } For Directors / Managers and all key roles
- Transition / Change Programme }
- Coaching / Facilitation training (emphasis on the BDM role / relationship)

© Enterprising Futures

B2. 'Be Your Own Brand Partner'

The consulting process we would follow to implement this approach is typically in phases:

PHASE 1:	**Pre Pilot**	**To validate the proposition**
PHASE 2:*	**Pilot Preparation**	**To create the enterprise incubator - systems, processes, content and relationship**
PHASE 3:	**Pilot and Evaluate**	
PHASE 4:	**Roll-Out**	

(*Within this, we would typically create a blueprint process similar to the one overleaf)

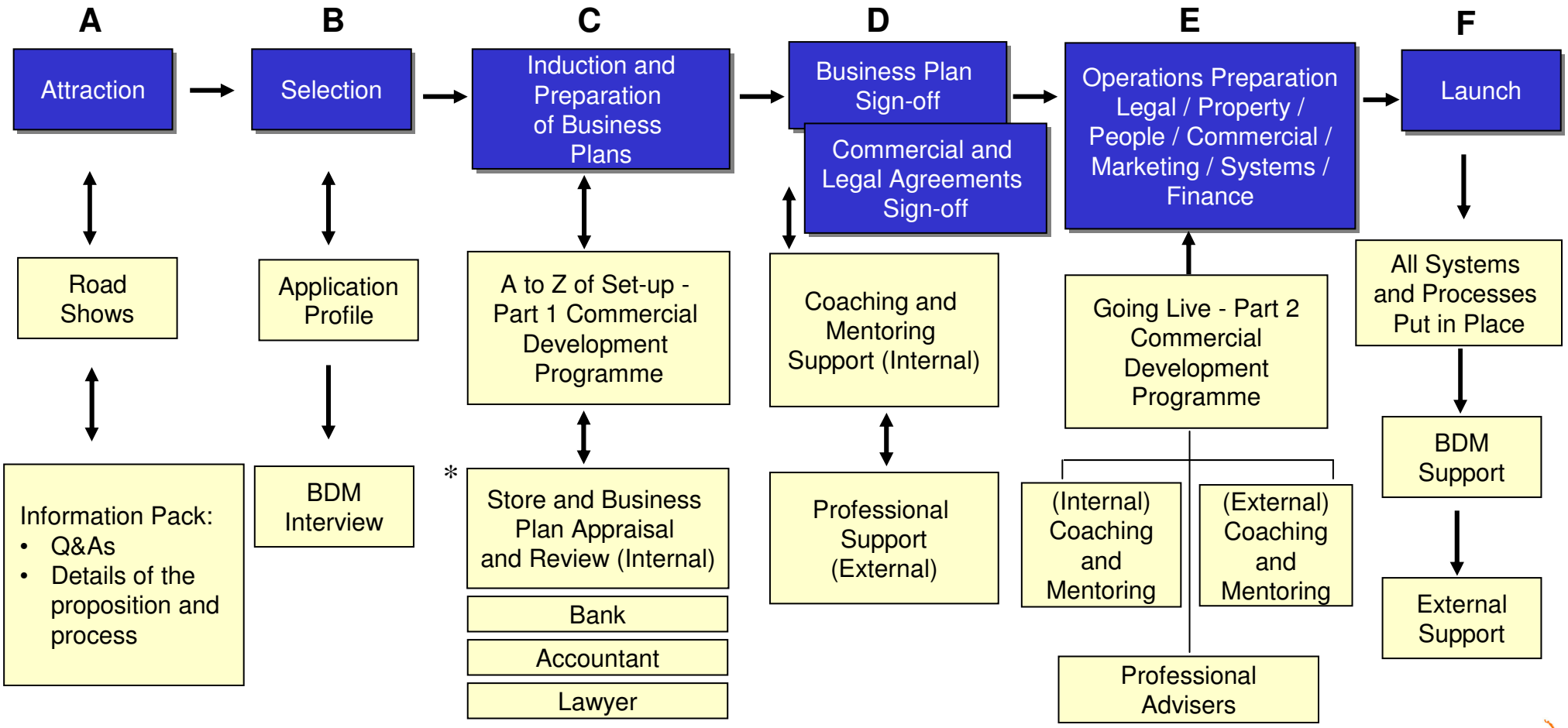
ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

B2. 'Be Your Own Brand Partner'

The Brand Partner Concept: A Code Word for Business Transformation - More than Franchising!

Do we have a clear people process and can we operate it smoothly and within a defined timeframe?



*This includes TUPE and all people issues

© Enterprising Futures

B2. 'Be Your Own Brand Partner'

PHASE 1
Scoping, Sizing and Preparing the Case

- Financial modelling
- Core assumptions and case preparation
- Simulation activity
- Initial behaviour activity

PHASE 2
Preparing for Pilot

- Behavioural profile and recruitment / selection pack
- Completed simulation and development programme
- Brand Partner agreement
- Brand Partner manual
- Business Planning kit
- Management and evaluation guidelines / structure

PHASE 3
Pilot

- Partners and teams selected and trained
- Business plans signed-off
- 12 month pilot and 6 month stage gate
- Evaluation and refinement

PHASE4
Roll - Out

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning

For more information ….

We would be pleased to share our wide range of materials with you e.g.

- Corporate Release or ‘Intrapreneuring’
- The Brand Partner Concept
- Case studies
- Articles

ENTERPRISING FUTURES © Enterprising Futures

tda transitions & learning