Cascade P5 Roundtable: Building Capacity for Growth
Program is Specifically Designed To:

We often hear one of the predominate challenges of becoming a successful business owner or manager is isolation in our daily operations. As a result, Cascadia Business Development joined together with the School of Extended and Lifelong Learning and the Missoula Area Chamber of Commerce to create a dynamic program that helps businesses and organizations of all sizes grow their strengths and reach their potential. The program was founded on the premise that all businesses have great opportunity when focused on creating ease, flow, and joy in their organization.

- By EASE we mean learning from others, building on existing systems, creating an environment of collaboration, dealing with the “tough-stuff” with confidence.
- By FLOW we mean momentum towards a goal, momentum in serving clients and customers, momentum in cash flow, creating repetitive cycles of growth and development by continuously building capacity for the future.
- By JOY we mean helping business owners and their teams focus more on what they want and mapping a path to achieve it. Using “how one feels” as a valid approach to gauge ease, flow and the successful growth of individuals and the organization.

This program is designed to systematically and directly support business leaders (owners, managers, supervisors) as they address common issues impacting organizations at various stages of growth. The program is designed to create an environment of “fast-paced, high-level, focused, supportive, and quality” learning and insight.

Program Framework:

The program is based on the P5 (purpose, process, product, people, profit) Training and Development Model as the primary framework.
Strategic Goals

- Purpose Management
- Product & Service Management
- Process Management
- People Management
- Profit Management
Training and Development Series:

Over a twelve month period, participants gain in-depth knowledge and understanding of critical business topics. The learning begins with pre-session homework, organizational assessments, and custom video -insights from over 30 professional experts. Over the course of the program, participants will achieve the following learning objectives:

• **Purpose Management:**
  o Organizational Development and Design
    ▪ Impacts of entity selection, owner/investor management, business plan development, and succession planning
    ▪ Importance of strong cultural development, effective change management, organizational evolution
  o Organizational Leadership
    ▪ Personal authenticity, change management, leadership style selection, importance of trust-based environment, governance and multiculturalism, issues management, leadership ethics, organizational behavior, situational analysis and management

• **Profit Management:**
  o Financial Management
    ▪ Understanding financial statements, advantages and disadvantages of budgeting, financial analysis tools/methods, and product budgeting
  o Profitability Management
    ▪ Utilizing tools such as scorecards, KPI matrix, value-based decision making, and cost-volume-profit analysis

• **Process Management:**
  o Lean Operations
    ▪ Understanding lean principles and practices of quality system auditing, quality standards, operational and resource alignment, standardization strategies and techniques, waste identification and elimination, developing continuous improvement strategies
• **People Management:**
  o **Human Resource Basics**
    ▪ Exploring various tools and strategies for effective job structuring, recruiting, hiring, and retention
    ▪ Understanding Montana State Laws relating to hiring, discrimination, equal opportunity, probation, corrective action, and firing
  o **Performance Management**
    ▪ Effective methods in establishing records, performance goals, designing and conducting performance reviews, training and development program management, strength-based coaching and mentoring programs
    ▪ Managing difficult people and situations including remote employees, technical vs non-technical behavioral types, and personality type management
    ▪ Identify tax and healthcare issues associated with employee benefits, compensation modeling

• **Product/Service Management:**
  o **Relationship Management**
    ▪ Impact of customer loyalty on increasing customer base, sales, servicing, profitability, life-time value calculation, and customer retention
    ▪ Explore the importance of customer segmentation, needs assessment, rewards programs
  o **Product and Pricing Strategy**
    ▪ Learn various methods to analyze and improving pricing model, trends in buying behaviors, and developing a competitive pricing strategy
    ▪ Explore strategies for selecting meaningful research and development projects, project management, common issues managing R&D projects
    ▪ Discuss key elements in managing overall product strategy including market analysis, distribution strategies, product profitability, marketing, and sales readiness and implementation
  o **Sales Management**
    ▪ Developing sales and marketing strategies, export management, sales compensation, social marketing, internet-based marketing and selling, and value based selling
**Program Features:**
- Business Capacity Assessment and Personal Strengths Assessment
- Initial Roundtables kick off in March 2015
- Monthly facilitated peer progression groups to drive participants toward building capacity the framework to progress on their business timeline and an outline to support each other in successfully completing the program.
- Quarterly workshop series that focuses on specific development areas as identified by the initial business assessment.
- Quarterly business-to-business networking events provide access to all P5 groups and opportunities for the exchange of information, ideas and support.
- Problem-solving sessions with a peer team.

**Roundtable Sequence:**
1) **Pre-Assessment** – every participant will conduct a pre-assessment with their team. The assessment is broken into five areas (purpose, process, people, product, profit) and designed to identify potential opportunities and/or barriers to growth.
2) **Industry Profile** – every participant will receive an industry profile outlining benchmarks, industry challenges, opportunities, management considerations, and key performance indicators.
3) **StandOut Profile** – each participant will take the StandOut assessment as the foundation for personal and group.
4) **Organization Development Plan** – the framework for each participant to build their organization’s development plan. Each quarter a new one-page plan will be created.
5) **Pre-Roundtable Exercises** – each month, pre-session videos/worksheets/assignments/etc. will be distributed to “frame” the upcoming roundtable topic. See topics listed above.
6) **Facilitated Roundtables** - monthly “tightly managed” roundtable discussions to stimulate peer problem solving, expansion of knowledge area, ability to see problem from varying perspectives, answering “Where are you?” and “What do you need?” Groups are limited to seven participants to maximize engagement.
7) **Monthly Action Initiatives** – using the development plan model, participants will record monthly action initiatives based upon roundtable discussion. These will be the starting point for next month’s check-in round.
8) **Check-In Speed Round** – accountability and transparency will result from monthly participant check-in’s. This is a very fast pace round with opportunity for discussion and additional feedback.
Program Time Commitment and Cost:

Program time commitment includes one, three-hour session per month and one, two-hour quarterly workshop. Additional time will be required to complete pre-session assignments and initial assessments.

- Classroom time – 36 hours
- Workshop time – 8 hours
- Homework time – 12 hours

Monthly program cost is $299.00 billed quarterly or $3,500.00 paid in full. Annual Program Value estimated at $9,600.00 in materials, education, instruction and mentoring.

CONTACT INFORMATION

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