Quarterly Business Plan Introduction

Topic	Description	doHow® Remarks
BPFY→BPFQ	The quarterly business plan, is a necessity, especially now during the extremely uncertain times due to Covid19. The tracker may be used as a template to plan and track the various activities done in a world class company.	doHow® drives thinking progressively for evolving an agile mindset with its practices and games.
Stand-up	Organisational performance is like a team game, wherein a the strategic timeout is based on the scoreboard. In the same way a scoreboard serves as the basis for daily stand-up meeting with all functions for a team outcome.	Daily Operations Review in doHow® Mobile App or "Stand-up Checklist" in Hardcopy.
Sharpening	Every function in a company meet every week to discuss their strategy and approach to excel in their contribution. Instead of the conventional meeting, doHow® Web App can be used for a structured and guided sharpening.	doHow® Games is an option for sharpening.
Management	Shared leadership among the functional leaders of a unit is the ideal way of steering this unit to success. A thorough monthly review of the business by this shared leadership or management is the core element of this success.	Monthly Review Meeting in doHow® Mobile App or customised Standard Agenda
Board	A quarterly review of the business by the board of a company is not only a statutory requirement but also an essential one for the overall health of the company. Getting the board to get to know people and the actual reality is a robust way of nurturing a down to earth board.	Customised board agenda
Sales	Channels, disruptions, evidences, funnel, expertise, buying motive, relationships, strategy, voice of customer, persona, sales pitch,...	doHow® Game Edition for Marketing and Sales Skills
Basics	Habits, situation analysis, complex problem solving, decision making, communication, collaboration, mindset, potential, awareness, storytelling, values,...	doHow® Game Edition for Employability Skills
Process	Application, contribution, value stream, business processes, engineering, evidences, hypothesis, problem solving, scoreboards, review meetings,...	doHow® Game Edition for MFG Engineering and Quality Assurance Skills
Vendors	Supply chain optimisation, cost reduction, consistency, excellence, relationships, reporting, systems, value stream, dilemmas,...	doHow® Game Edition for Supply Chain and Strategic Sourcing Skills
Design	Market drivers, need, application, creativity, disruption, contribution analysis, problem solving, learning, questioning, segments, technology,...	doHow® Game Edition for Product/Service Development
Project	Information flow, critical chain, feeders, buffers, reporting, roles, strategy, teamwork, value streams, coordination, planning, complexity,...	doHow® Game Edition for On-Spec | On-Time | On-Budget Project Skills
Team	Practices, dilemma, consistency, expertise, hypothesis, learning, mindset, system, potential, performance, opinions, perceptions,...	doHow® Game Edition for Teambuilding
Leading	Purpose, change, personality types, soft skills, feedback, feedforward, changing the perspective, independence, coaching, mentoring,...	doHow® Game Edition for Leadership and Management Skills

Quarterly Business Plan Tracker Legend

SB	Daily **S**core**b**oard covering Innovation/Improvement, Productivity, Quality, Cost, Delivery, Response, Time, Safety, Morale
SF	Proactive analysis of **S**uccess/**F**ailure of Previous Day(s) along with the Change/Action initiated from Learning and 100% Full-kit confirmation for Today
RP	**R**olling **P**lan with priority for Overdue | 100% Full-kit for Tom by EoD Today | Plan frozen for Day-After-Tom (100% Load) | Priorities clear for Day-Day-After-Tom. Even a Task Kanban can be used.
DM	Decision on Immediate Containment (Concession | Alternate Process | Firewall) for **D**eviation **M**anagement of observed Non Conformance to Plan/Standard
TW	Confirmation of Seamless **T**eam**w**ork with everyone striving for their respective functional excellence with clear Roles/Goals/Routines
RC	Rewards, **R**ecognitions and **C**elebrations of Success/Special Occasions for motivating/inspiring the team
ES	**Es**calating for Heads-up | Support | Approval for Quick Resolution of issues and maintaining continuous flow
OP	Updating Attendance | **O**pen **P**oints List | Status of Actions (Green | Yellow | Red) and random confirmation of executing all decisions and closed points
DP	**D**eviations **p**rioritized from previous week for learning by deep diving to detect in advance, prevent the occurrence and predict while planning itself
RA	Performing/Discussing/validating **R**oot Cause **A**nalysis (RCA) for the deviations and concerns by convincingly answering Detection? Occurrence? Prediction?
CP	Discussing/planning/prototyping **C**orrective/**P**reventive Actions (CAPA) for improvement and updating of Standards | Procedures | Instructions
CB	Confirmation of sufficient **C**ontingency **B**uffer derived from the estimated yield of all the planned measures and actions, to counter the unexpected
AH	**A**genda of the monthly business meet is decided and distributed 1 week in advance and the presentation **h**andouts distributed 2 days in advance.
VN	**V**alidatio**n** of the proper functioning with efficiency and effectiveness of the daily standing meets and weekly working meets
SS	**S**takeholder **S**coreboard for self perception of the satisfaction of customers, shareholders, employees, vendors/partners and society
BS	**B**usiness **S**coreboard for the current situation against targets along with trends, benchmarks and best performance of all the key business metrics
PS	**P**urpose **S**coreboard for self/random perception of Agile Maturity on Intolerance for Interruptions, Awareness for Authenticity and Excitement for Evolution
AD	System and process **a**u**d**it results and the status along with a random validity check of the counter measures introduced
DN	Individual Presentations followed by clearly articulated **d**ecisio**n**s and the approved budget changes needed to continue the flow till the next monthly business meet
VS	Detailed **vis**it to Gemba along with interaction with people and distribution of awards and certificates
FS	Review, plausibility check, discussion and approval of the **f**inancial **s**tatements balance sheet, profit and loss account and cash flow statement
BH	Review, discussion and approval of the **b**usiness **h**ealth check along with key strategic directional decisions
4Q	Review and sign-off of the Values, Mission and Vision statement along with **4Q** long term plan and the accompanying strategies
BP	Review, plausibility check, discussion and approval of the **b**usiness **p**lan for the next quarter, including approval of CAPEX projects
CG	Review and confirmation of **c**ompliance and proper **g**overnance along with the adequacy of measures for ensuring compliance and proper governance
MM	**M**inute of the **m**eeting with clear demarcation items only for information, comments to be considered and decisions to be acted upon

Quarterly Business Plan Tracker

BPFY⟶BPFQ		STAND-UP (08H~30M)							SHARPENING (14H~1H)						MANAGEMENT (14H~3H)								BOARD (14H~4H)						
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29JUN20	MON								SALES						PREVIOUS QTR SUCCESS CELEBRATION EMPLOYEE APPRAISAL FOR PREVIOUS QTR EMPLOYEE DEVELOPMENT PLAN																	
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24AUG20	MON								SALES						CURRENT REALITY TREE, STRATEGIES															
25AUG20	TUE								PROCESS						FUNCTIONAL VALUE STREAM REVIEW															
26AUG20	WED								VENDORS						PREVIOUS QTR, CURRENT QTR-QTD/LE															
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31AUG20	MON								SALES						BOTTOM-UP NEXT QTR BP, CASH FLOW															
01SEP20	TUE								BASICS						POLICY, GUIDELINES REVIEW															
02SEP20	WED								VENDORS						PROCESS MAPPING, MATURITY															
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BPFY⟶BPFQ		STAND-UP (08H~30M)							SHARPENING (14H~1H)						MANAGEMENT (14H~3H)								BOARD (14H~4H)						
DATE	DAY	SB	SF	RP	DM	TW	RC	ES	FOCUS	OP	DP	RA	CP	CB	FOCUS	AH	VN	OP	SS	BS	PS	AD	DN	VS	FS	BH	3Y	BP	CG	MM
08MAR21	MON								SALES						MARKET FORECAST - 1Y (4Q) NEXT QTR BP APPROVAL CUSTOMER SATISFACTION SURVEY															
09MAR21	TUE								PROCESS																					
10MAR21	WED								VENDORS																					
11MAR21	THU								PROJECT																					
12MAR21	FRI								LEADING																					
13MAR21	SAT																													
14MAR21	SUN																													
15MAR21	MON								SALES						BOARD MEETING															
16MAR21	TUE								BASICS																					
17MAR21	WED								VENDORS																					
18MAR21	THU								DESIGN																					
19MAR21	FRI								TEAM																					
20MAR21	SAT																													
21MAR21	SUN																													
22MAR21	MON								SALES						CASCADING OF THE NEXT QTR GOALS OVERALL EMPLOYEE RATING/RANKING REORGANISATION FOR NEXT QTR															
23MAR21	TUE								PROCESS																					
24MAR21	WED								VENDORS																					
25MAR21	THU								PROJECT																					
26MAR21	FRI								LEADING																					
27MAR21	SAT																													
28MAR21	SUN																													
29MAR21	MON								SALES						PREVIOUS QTR SUCCESS CELEBRATION EMPLOYEE APPRAISAL FOR PREVIOUS QTR EMPLOYEE DEVELOPMENT PLAN															
30MAR21	TUE								BASICS																					
31MAR21	WED								VENDORS																					
01APR21	THU								DESIGN																					
02APR21	FRI								TEAM																					
03APR21	SAT																													
04APR21	SUN																													

Quarterly Business Plan Tracker

BPFY⟶BPFQ		STAND-UP (08H~30M)							SHARPENING (14H~1H)						MANAGEMENT (14H~3H)								BOARD (14H~4H)						
DATE	DAY	SB	SF	RP	DM	TW	RC	ES	FOCUS	OP	DP	RA	CP	CB	FOCUS	AH	VN	OP	SS	BS	PS	AD	DN	VS	FS	BH	3Y	BP	CG	MM
05APR21	MON								SALES						LEARNING AND DEVELOPMENT PLAN															
06APR21	TUE								PROCESS						EMPLOYEE POTENTIAL ASSESSMENT															
07APR21	WED								VENDORS						PROBLEM SOLVING EFFECTIVENESS															
08APR21	THU								PROJECT																					
09APR21	FRI								LEADING																					
10APR21	SAT																													
11APR21	SUN																													
12APR21	MON								SALES						INCREMENTS AND PROMOTIONS															
13APR21	TUE								BASICS						CORE COMPETENCIES															
14APR21	WED								VENDORS						PRODUCTS/SERVICES PORTFOLIO															
15APR21	THU								DESIGN																					
16APR21	FRI								TEAM																					
17APR21	SAT																													
18APR21	SUN																													
19APR21	MON								SALES						TECHNOLOGY ROADMAP															
20APR21	TUE								PROCESS						VENDOR DAY, FEEDBACK SURVEY															
21APR21	WED								VENDORS						SYSTEM AND PROCESS AUDIT															
22APR21	THU								PROJECT						EFFECTIVENESS															
23APR21	FRI								LEADING																					
24APR21	SAT																													
25APR21	SUN																													
26APR21	MON								SALES						SUCCESSION AND CAREER PLANNING															
27APR21	TUE								BASICS						MARKET FORECAST - 1Y (4Q)															
28APR21	WED								VENDORS						PEST/SWOT ANALYSIS															
29APR21	THU								DESIGN																					
30APR21	FRI								TEAM																					
01MAY21	SAT																													
02MAY21	SUN																													

Quarterly Business Plan Tracker

BPFY⟶BPFQ		STAND-UP (08H~30M)							SHARPENING (14H~1H)						MANAGEMENT (14H~3H)								BOARD (14H~4H)						
DATE	DAY	SB	SF	RP	DM	TW	RC	ES	FOCUS	OP	DP	RA	CP	CB	FOCUS	AH	VN	OP	SS	BS	PS	AD	DN	VS	FS	BH	3Y	BP	CG	MM
03MAY21	MON								SALES						VISION MISSION VALUES 1Y (4Q) ANNUAL PLAN FOR KEY DATA KEY FOCUS AREAS															
04MAY21	TUE								PROCESS																					
05MAY21	WED								VENDORS																					
06MAY21	THU								PROJECT																					
07MAY21	FRI								LEADING																					
08MAY21	SAT																													
09MAY21	SUN																													
10MAY21	MON								SALES						NEXT QTR FRAMEWORK, GUIDELINES COMPETITOR BENCHMARKING SELECTION/CONTRACTING OF A COACH															
11MAY21	TUE								BASICS																					
12MAY21	WED								VENDORS																					
13MAY21	THU								DESIGN																					
14MAY21	FRI								TEAM																					
15MAY21	SAT																													
16MAY21	SUN																													
17MAY21	MON								SALES						BUSINESS HEALTH CHECK EMPLOYEE SATISFACTION SURVEY SOCIETY SURVEY, EXPECTATIONS															
18MAY21	TUE								PROCESS																					
19MAY21	WED								VENDORS																					
20MAY21	THU								PROJECT																					
21MAY21	FRI								LEADING																					
22MAY21	SAT																													
23MAY21	SUN																													
24MAY21	MON								SALES						CURRENT REALITY TREE, STRATEGIES FUNCTIONAL VALUE STREAM REVIEW PREVIOUS QTR, CURRENT QTR-QTD/LE															
25MAY21	TUE								BASICS																					
26MAY21	WED								VENDORS																					
27MAY21	THU								DESIGN																					
28MAY21	FRI								TEAM																					
29MAY21	SAT																													
30MAY21	SUN																													

Quarterly Business Plan Tracker

BPFY⟶BPFQ		STAND-UP (08H~30M)							SHARPENING (14H~1H)						MANAGEMENT (14H~3H)								BOARD (14H~4H)						
DATE	DAY	SB	SF	RP	DM	TW	RC	ES	FOCUS	OP	DP	RA	CP	CB	FOCUS	AH	VN	OP	SS	BS	PS	AD	DN	VS	FS	BH	3Y	BP	CG	MM
31MAY21	MON								SALES						BOTTOM-UP NEXT QTR BP, CASH FLOW POLICY, GUIDELINES REVIEW PROCESS MAPPING, MATURITY																
01JUN21	TUE								PROCESS																				
02JUN21	WED								VENDORS																				
03JUN21	THU								PROJECT																				
04JUN21	FRI								LEADING																				
05JUN21	SAT																												
06JUN21	SUN																												
07JUN21	MON								SALES						MARKET FORECAST - 1Y (4Q) NEXT QTR BP APPROVAL CUSTOMER SATISFACTION SURVEY																
08JUN21	TUE								BASICS																				
09JUN21	WED								VENDORS																				
10JUN21	THU								DESIGN																				
11JUN21	FRI								TEAM																				
12JUN21	SAT																												
13JUN21	SUN																												
14JUN21	MON								SALES						BOARD MEETING														
15JUN21	TUE								PROCESS																				
16JUN21	WED								VENDORS																				
17JUN21	THU								PROJECT																				
18JUN21	FRI								LEADING																				
19JUN21	SAT																												
20JUN21	SUN																												
21JUN21	MON								SALES						CASCADING OF THE NEXT QTR GOALS OVERALL EMPLOYEE RATING/RANKING REORGANISATION FOR NEXT QTR																
22JUN21	TUE								BASICS																				
23JUN21	WED								VENDORS																				
24JUN21	THU								DESIGN																				
25JUN21	FRI								TEAM																				
26JUN21	SAT																												
27JUN21	SUN																												

Name of the Company/Team

Meeting Agenda	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	%Y(Green)
Traceable Scoreboard (IPQCDRTSM) with Past | Trend | Best Achieved and/or Target | Actual | Estimate																															
Proactive analysis of Success/Failure Y-day | Full-kit confirmation for Today/Tom by respective owners																															
Priority for overdue | Frozen plan OK Today | Plan frozen for Tom (100% Load) | Priorities clear for Day-After-Tom																															
Actions for deviations in Standards | Checklists (Self Maintenance) and improving/updating them																															
Seamless teamwork and everyone is striving for functional excellence with clear Roles/Goals/Routines																															
Celebrating Success/Special Occasions and motivating/inspiring the team																															
Escalating for Heads-up | Support | Approval for Quick Resolution of issues and maintaining continuous flow																															

Date	Remarks	Date	Remarks	Date	Remarks

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