

Initial Assessment Program

Navigate's success-proven Assessment Process helps to determine your organization's current condition and which kinds of assistance will be most valuable. While each situation is unique and times or tasks may vary, most contain these elements:

Documentation Review (off-site)

Sales

Mission / Strategy
Marketing
Business Development
Market Segmentation
Site Survey
Scope of Work
Contract Change Orders
Client Surveys
Value Measurement

Implementation

Drawings (examples)
Estimation process
Kick-off meetings
Project Management
Technical Processes
Field Change Orders
Training / Testing
Substantial Completion
Service Transition

Admin and Financial

Procurement / Warehousing
Billing & Collection
Financial Analysis
Cash Flow & Cash Projection
Information System(s)
Organization Structure / Roles
Training / Development
Compensation / Incentive Plans
Performance Measurement

Interviews (on-site, off-site, on-line)

President / Owner(s)
Vice Presidents
Financial Officers
Sales People

Designers
Engineers
Field / Service Techs
Project Managers

Procurement
Warehouse
Human Resources
Finance (AP / AR)

Findings, Analysis, Reporting and Prioritizing (On-site – 2 days)

Findings	Day 1 Morning – All parties together
Principles and Templates	Day 1 Afternoon – three Functional groups
Recommendations	Day 2 Morning – three Functional groups
Next Steps	Day 2 Afternoon – All parties together

Coaching

Based upon Findings / Recommendations / Next Steps
12 – 24 one hour sessions with groups or individuals (audio or videoconference)

Closeout and Wrap-up

A .5 to 1 day session (on-site or videoconference)

For more information, contact:

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