

MYVALUETREE.COM PRESENTS



Increasing Business Effectiveness...solving complex management problems with a group-based process

“All improvement efforts are waste if they do not have a positive impact in the books.” -Alden B. Davis

Why do this?

At the end of this workshop, controllers will be able to put improvement efforts within the context of broader business requirements of shareholder expectations and engage their organizations from the perspective of a CFO.

CREATING FINANCIALLY-BASED VISIONS OF EXCELLENCE ... A LEAN CONTROLLERS WORKSHOP

This workshop is designed to shift your controllers from scorekeepers to leaders and become a potent force for defining and driving organizational change initiatives.

Too often controllers are reporting after-the-fact instead of visionary leaders on improvement efforts. Controllers are ideally positioned within the organization to ensure that all improvement efforts are properly targeted to deliver relevant results. Controllers can become powerful financial strategists able to create the financial roadmap when they know the techniques of organizational improvement. By experiencing the concepts of lean in a workshop environment, as well as in the shop, controllers become credible when giving direction to the management team.

Our workshop is designed around two models; The ValueTree™ and the Strategic Integration Model. These two models equip the controllers with the insight that make CFO's successful. The ValueTree™ is the entire world of finance on one page, right down to the details managed by a first line supervisor... and, all improvement techniques are linked to specific budget line items. In this way, accurate plans can be established for selecting projects and measuring success. Topics addressed in detail include performance cultures, industrial relations, supply chains and HR-performance management. The Strategic Integration Model examines the six key elements of interest to investors as they determine if a business is investable. Performance track record, culture and improvements from current operations are explored in detail.

Experience lean principles in a learning laboratory called the Model Airplane Factory.



Determine the organization's lean strategy with other Controllers.

MyValueTree.com

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Objective

Develop skills in controllers to provide direction to Operations in the development of improvement strategies that drive maximum value.

Outcomes

At the end of the workshop, controllers will become:

1. Leaders in operational improvements and creators of financially-based visions of excellence
2. Strategists laying out the financial roadmap that defines improvement projects
3. Inductees in the concepts of Socio-Technical work systems, including the best of lean, kaizen and continuous improvement
4. CFO trainees capable of weaving the story from Investor Relations through the supply chain
5. Partners with management and drivers of business improvements based on sound financial strategies

Approach

The workshop is made up of three components; theoretical, learning lab and application. Strategic, leadership and operational perspectives are addressed throughout the sessions. All information is presented through the structure of The ValueTree™ and the Strategic Integration Model. The ValueTree™ is a graphical representation of how money flows through the business on one page. It is designed to help people understand the interconnections and inter-relationships of money and what drives the value of the business. The ValueTree™ demystifies the money flows and helps people think like the CEO and CFO.

Based on the McKinsey valuation model that Return on Invested Capital (ROIC) is the best indicator for determining a firm's worth (stock price), the ValueTree™ begins with ROIC and breaks the dollars down to the specific budget line items a first line supervisor would impact, such as labor, over-time and supplies. Each continuous improvement project within a Value Stream Transformation Plan is then linked to the ValueTree™ so that people are clear about turning their improvement effort into real value.

Topics covered include:

Lean Leadership	World-class manufacturing techniques	Image management
Investor Relations and FP&A	Industrial Relations	Order-to-Cash
The ValueTree™	Strategic Integration Model	Model Airplane Factory, learning lab
Work design and social systems	Be the CFO...practicum	HR & Performance Management
Performance cultures	Supply chain consortiums	

A recommended schedule for a one-week workshop is as follows:

Monday	Tuesday	Wednesday	Thursday	Friday
The world of the CFO - IR - FPA - Finance, Inc. - ImageMgmt	The ValueTree Order-to-Cash Strategic Integration	Model Airplane Factory* * 24 people minimum	HR&PerfMgt Work Design Supply Chain	Practicum: Creation of back-home improvement roadmap
Lean Ldrshp & World Class Manufacturing 5-S project	- Mfg. Techniques, continued - Airplane Fact. preparation -Flow Mapping		Perf. Cultures Lessons in Leadership ValueTree Proj	Management presentations

Workshop participants need access to year-end data from their respective sites to complete a customized ValueTree™ analysis and prepare their final assignment. The session would best be opened by the CFO discussing the current financial situation, Wall Street analyst coverage and next year's outlook. The final session presentations would be to an audience of appropriate managers. Participants get a ValueTree™, forms and a copy of the book The Principled Supervisor.