

## INTRODUCTORY WORKSHOP: Think Like a CEO

### Succession From Specialist to Generalist

The transition from specialist to generalist means taking on cross-functional responsibilities for decisions involving every department. **You have to think like a CEO.** But new managers often come from one discipline and don't have the knowledge they need—or the time or money for an MBA.

#### Level 1

1. Structure
2. Marketing and sales
3. Operations
4. Information
5. Human resources
6. Finance

### Creating and keeping focus is the leader's biggest challenge



**But focus is impossible until everyone speaks the same language and uses the same tools.**

Center members use the **GM's Toolkit** and **GM's Index of Terms** to remove the barriers to focused collaboration—and to make meetings effective, efficient and rewarding.

### In this workshop, you'll learn how to think like a CEO and...

1. Break down siloes by learning the standard language of management
2. Make disciplined capital decisions and set a long-term vision (see next page)
3. Quickly get everyone working off the same set of terms and best practices
4. Lead effective meetings by asking skillful questions
5. Have taken a step toward our complete certificate in general management

#### Date, time and place

Day  
Time  
Location  
Address  
City, ST ZIP

Register at Events:  
[www.theindex.net](http://www.theindex.net)  
(608) 260-9300

*The GM's Index of Terms is a library, a checklist and a framework for learning*

### ROI from new knowledge and skills

- Better performance on plans and projects
- Fewer errors and delays from miscommunication
- More cooperation, fewer silos and higher morale
- Stronger leverage of the specialists' talents
- A more effective succession plan

*See program details on next page*

## LEARNING STEPS (2-1/2 hours)

Focusing on two practical, cross-functional management decisions will help you think like a CEO. You'll have to see the big picture, ask great questions and listen hard to what your teammates have to offer. There are samples and instructions for each tool in our **GM's Toolkit** ([www.theindex.net](http://www.theindex.net)). *All our tools are only one page.*

### 1. Make a capital decision: Don't miss anything

- *Tool: Question Map (the "Antique Coffee" case)*
- *Small group activity:* After brief setup, develop critical questions
- Develop skills asking open-ended questions

### 2. Craft a vision: Think like an entrepreneur

- *Tool: 5-Year Look*
- *Small group activity:* Develop a vision for Antique Coffee
- Compare results. You'll be surprised how different teams can be!

### 3. Explore the characteristics of great managers

1. What were the outstanding personality traits of your favorite manager?
  2. How can their power help or hurt a general manager's effectiveness?
  3. How are managers different from leaders as people?
- **Homework:** Promise to take on a challenge to develop as a manager

**Follow-up:** Evaluation by participants, supervisor, and 90- day check-in by CMTF

Have The GM's Index of Terms ([www.theindex.net](http://www.theindex.net)) open for questions, context and resources:

**TOP 3 GOALS**

1. Increase Gross Margin
2. Reduce plant turnover
3. Earn \$4M from new products

**Initial decision question:** Should we add robotics to our assembly operation?

**Final decision question:** Should we buy or lease the subassembly X robot?

**Decision:** Lease the subassembly robot and evaluate it.

**1.0 STRUCTURE**

1. What are our risks when our key patent expires in 5 years?
2. Can we reduce warehouse space substantially?
3. How will we increase our new product pipeline?

**2.0 MARKETING & SALES**

1. How solid is our new product market research?
2. To speed our only customer service challenge?
3. How might sales territories need to evolve?

**3.0 OPERATIONS**

1. Where will our bottlenecks move?

HIGHLIGHTS OF OUR ORGANIZATION			
	5 YEARS AGO	TODAY	5 YEARS
Key product/service:	WidgetOne	Widget family	Widget
Revenue:	\$19,000,000	\$31,500,000 (+66%)	\$45.5M
Income:	\$500,000	\$2,300,000	\$5-7.0
Employees:	12	20	25-28
Customers:	100	210	400-450
Facilities:	10,000 SF, 1 building	15,000 SF, 1 building	Added
STRUCTURE	Managed by founders	Strategic plan	ESOP
	Business plan	JV with ACME Supply	Nation
		Advisory board	
MARKETING & SALES	Static website	Online ordering	Custom
	3 independent sales reps	Regular market research	Robust
		3 inside sales reps	Target
OPERATIONS	3 processing machines	Quality management system	Outsourced
	3 key suppliers	ISO 14000	RFP used
INFORMATION	ERP	First robotics	Six sigma
		New CRM	All data
		New business intelligence	Updated
HUMAN RESOURCES	No HR leader	HR Director	State of
		Employee manual	Created

**Cost:** \$250 (\$200 for members). **Register:** At Events at [www.theindex.net](http://www.theindex.net)  
**Call (608) 260-9300 with questions**

*The Question Map and The GM's Index got my team asking questions at a very high level. We now use the Question Map to make major capital decisions. – Bryon Johnson, CEO, MCD, Inc.*