



Working With The Octagon Group Vision to Execution

Step One: Preliminary Meeting

Octagon Partner meets with client to:

- Review current business development plans, priorities, goals and vision
- Discuss current and future infrastructure of organization
- Conduct in-person or phone interviews with other individual within the company,
- Client and Dennis Black work up an agenda

Step Two: Initial Agenda & Background

Client and The Octagon Group partners will receive a binder that includes:

- Final agenda
- Background information on the client
- Industry and other useful information

Step Three: Subjects covered pre-session with Octagon Group only

- Priorities goals and vision for client
- Prior to the meeting, each partner will have spent a minimum of two hours on their own researching the industry and client, plus participate in a telephone conference with the other partners. The Octagon Group also meets before the client meeting to go over any thoughts or last minute creative ideas

Step Four: Philosophy

Our philosophy: "Small is Good"

- To optimize the output, the initial group will consist of 1-3 members of the client's company plus 3-5 partners of The Octagon Group for a three-to five-hour initial meeting
- Meeting is facilitated by one of The Octagon Group partners

Step Five: Goals for Sessions

- The Goal is to complete the work in two to three sessions and to work through the agenda for each session
- The agenda is the starting point for meaningful ideas and creative thoughts by the entire group that will determine the client's vision, mission, strategic plan and objectives
- We have found that typically by the end of the second session, the client's strategies and action plans are laid out

Step Six: Outcome(s)

After each formal meeting, the client is given a written and verbal recap by Dennis Black (1-1½ hour discussion) of session

- Questions are answered
- Discussion of next steps
- Agenda for next session is developed

Step Seven: Completion

Once the client has completed the strategy development cycle and has an action plan in place, The Octagon Group may hand off the execution of the plan to the client and to those vendors* who will assist in the execution. If the client would like a member(s) of the Octagon Group to help with the execution of the strategic plan this may also be agreed to.

*The Octagon Group maintains a recommended vendor list (writers, graphic designers, web designers, etc.) for the client to consider.

THE OCTAGON GROUP

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