Crimson Eagle Global Enterprise

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CRIMSON EAGLE GLOBAL ENTERPRISE

A Project
Presented to the
Faculty of
California State University,
San Bernardino

In Partial Fulfillment
of the Requirements for the Degree
Master of Business Administration

by
Scott Edward Bechtle
December 2003
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Date November 28, 2003
ABSTRACT

This graduate project is the culminating proof of the skills learned during the past two years of completing my dual Masters’ degrees, demonstrating the skills mastered and recognizing those skills still needing development.

This project is the initial step in developing a strategic business plan. The traditional business plan contains many sections (Business Description, Marketing, Competition, Operating Procedures, Personnel, Business Insurance, and Financial Data). Using a different style, this project simply highlights those sections, rather than going into detail.

Making the conscious decision and approaching the overall development process from a project management perspective, I segregated the various sections into inter-related projects. Although each section is highlighted exhibiting the overall approach, greater detail is demonstrated in the Organization, Customer, and Product Information. I selected these sections because I could focus developing them myself during my studies without requiring additional financial costs or, because of their scope, did not require additional expertise beyond my current abilities.
Therefore, I organized this project as follows:

- **Business Information**
  - This section introduces the business, project, and development process.

- **Financial Information**
  - The section highlights the budget issues.

- **Environmental Information**
  - This section highlights the environmental issues.

- **Organization Information**
  - This section introduces the organization development and information structure.

- **Customer Information**
  - This section introduces the customer development and information structure.

- **Product Information**
  - This section introduces the product development and information structure.

Ultimately, the project’s goals are not only to adequately demonstrate sufficient academic proficiency to graduate, but also establishing the foundation and confidence for further plan development so that I can start my own company.
RÉSUMÉ

Ce mémoire de 3ème cycle est l’aboutissement et le témoin des compétences apprises lors de ces deux dernières années passées à acquérir mon double diplôme Master. Il met en évidence les compétences acquises sans sous-estimer celles susceptibles d’amélioration. Ce mémoire est l’étape initiale dans le développement d’un plan stratégique d’entreprise. Le plan traditionnel d’entreprise contient plusieurs sections (description de l’entreprise, marketing, concurrence, procédures opératoires, personnel, assurance de l’entreprise et données financières). Dans un style différent, ce mémoire se contente d’attirer l’attention sur ces sections plutôt que d’aller dans le détail.

Selon une approche délibérée et centrée sur le processus de développement global dans une perspective de gestion de projet, j’ai séparé les différentes sections en projets étroitement liés. Bien que chaque section mise en avant soit envisagée dans une approche d’ensemble, une vue plus détaillée est manifestée dans les sections: organisation, client et information sur le produit. J’ai sélectionné ces sections d’une part parce que je pouvais me concentrer sur ces sujets sans encourir de frais financiers supplémentaires et d’autre part parce que le
champ d’action de ces sujets ne requérait pas une expertise au delà de mes compétences actuelles.

En conséquence, j’ai organisé mon mémoire comme suit:

• Information sur l’entreprise
  o Cette section introduit l’entreprise, le plan, et le processus de développement.

• Informations financières
  o Cette section met en avant les problèmes liés au budget.

• Informations relatives à l’environnement
  o Cette section met en avant les problèmes liés à l’environnement.

• Informations sur l’organisation
  o Cette section introduit le développement de l’organisation et la structure de l’information.

• Informations relatives au client
  o Cette section introduit le développement de la clientèle et la structure de l’information.

• Informations relatives au produit
  o Cette section introduit le développement du produit et la structure de l’information.
A terme, le but de ce mémoire est non seulement de faire la preuve d'une qualification suffisante pour obtenir le diplôme mais aussi d'établir les bases et la confiance nécessaires à un projet ultérieur de développement débouchant sur une création d'entreprise.
ACKNOWLEDGMENTS

I deeply appreciate the assistance and guidance I received from the faculties of Groupe Ecole Supérieure de Commerce Marseille Provence (France) and California State University, San Bernardino (USA). Their quality of education established a solid foundation for not only the completion of this project, but also instilled in me the confidence to not only pursue my career goals, but the knowledge that I will be successful. I specifically would like to extend my personal gratitude to my project advisors: John Costa, GESCMP; John Chaney, CSUSB; and C.E. Tapie Rohm, CSUSB, whose guidance, patience, and support were immeasurable.

Furthermore, I would like to extend my gratitude to my friends and family, specifically my parents, who supported me throughout my extensive academic endeavors, never giving up or doubting that I would eventually complete my studies; whose continuing support and assurances gave me the freedom to explore a multitude of academic pursuits.
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CHAPTER ONE

INTRODUCTION

The purpose of this project, and specifically this section, is establishing a connection between the project and academics. Particularly, to validate the project as an acceptable academic thesis/project for the Groupe Ecole Supérieure de Commerce Marseille Master’s in International Business and California State University, San Bernardino Master’s in Business Administration.

One reason for completing a business administration graduate degree is to improve one’s management knowledge and skills. The associated curriculum exposes and separately validates the student’s knowledge in various areas: Accounting; Finance; Geopolitics; Information Systems; Intercultural Communication; Marketing; Operations Management; and Organizational Behavior. Although the experience obtained through each class assists the student with understanding the subsequent coursework material, this project’s purpose is to cumulatively highlight and demonstrate, at an acceptable level, the proficiency and wisdom acquired through the curriculum completed at both campuses. As the first-stage for developing a strategic business plan for a fictitious,
multi-dimensional, global organization, this project will demonstrate my comprehension of the various subjects studied.

There are many steps involved in developing a business plan. Developed as part of a multi-step development process, the completion of each step serves as both a milestone and a control regarding further development. I chose this topic and approach for several reasons. This approach applies multiple project management skills, but also forces the focused systematic development serving as the immediate foundation for further development. From describing the business, customer, and product, to seeking investment, and actually establishing the business, each topic can be development separately, but based upon what was previously developed. Such a complete and full business development is beyond the scope of the project. However, this project establishes the foundation used in subsequent development, with each development stage a project itself.

The business development process requires addressing several issues. This project focuses on establishing and responding to various "what" questions that must be answered when launching a new business (or when expanding an existing one). After adequately identifying and
addressing these questions, development continues with (expanded) strategic and (detailed) operational and tactical information. The development of such information is addressing the multiple of relevant “how” questions that pertain to the aforementioned “what” questions. The full development and answering of such questions is beyond the scope of this project. However, several questions have been identified, developed in a limited scope, and can be found in the appendix. This project would then serve as the foundation for further business development: detailed strategic and operational information, seeking investment, or establishing corporate policies, procedures, guidelines, etc.

Beyond the academic reasons for choosing this topic: applying the full range of skills gained throughout my academic career and further refining and practicing the knowledge and skills utilized throughout my professional career in corporate and executive management; I also chose this particular topic because I hope to establish my own business someday, and this was a practical method for starting that process.
CHAPTER TWO

BUSINESS INFORMATION

Introduction

This section introduces the basic strategic information (product, price, promotion, and place) and business development strategy.

Strategic Information

One of the most important aspects of a business is properly identifying the relevant strategic information, generally referred as the four P’s: product; price; promotion; and place. Because Crimson Eagle Global Enterprise is a multi-dimensional organization, there will be various products eventually offered. This section generically introduces the associated strategy, whereas the Product Information section goes into more detail.

Product, Prices, Promotion, and Place (Distribution)

One of the most important products will be the company itself. Furthermore, as indicated in the Product Information section, there are four product categories: Revenue; Goodwill; Support; and Multi-Purpose. Developing the specific product will address its pricing, promotion, distribution, and place. However, in general, Revenue
categorized products will be premium priced, promoted through targeted advertising (webcast and direct to potential customers), and distributed directly to the consumers either through the internet (downloads) or shipped directly. At this time, considering retail outlets is not a profitable option, but that may change as the company grows and the product variety increases.

Business Development Strategy

Due to the complexity of developing a complete business plan, using project management techniques, the plan development is broken into several go/no go stages, with each stage serving as the foundation for the next stage. This process facilitated structured development, allows a focus of the essentials while minimizing overall costs. The complete initial business plan development is a Program. The Program consists of several key stages; each stage is a Project of the Program. However, because of the complexity of each stage, each stage is also a Program, sub-divided into Projects, Tasks, and Work Units. This format establishes a series of go/no go control checkpoints, both overall and within the sub-sections. Furthermore, this organization grants the flexibility for the simultaneously, organized progressive development of
different areas. For instance, while an Organization is still in the Development (Expanded Information) Stage, a Product may be in the Marketing/Testing (Post-Detailed Information) Stage. However, this structure also displays the relationship between projects, granting management the oversight ability to delay progress in one area in order to refocus resources to another more pressing area. The completion of each Project, Task, or Work Unit establishes the foundation for the subsequent step. This further supports the concepts of go/no go control as well as the interdependent relationship of the organization and its structure.

The overall strategy applied is to minimize actual monetary costs during the development process, utilizing donated work efforts and capital for the organization development. Therefore, addressing such significant development issues such as financial and environmental will not start until the overall Business Development Program reaches the second stage.

The business development process is broken into two separate programs: Business Development & Start-Up and Business Expansion/Improvement. This project focuses only on the first stage overall, but Appendix: Business
Development Outline further highlights the overall program.

Fully developing the Business Development & Start-Up Program is the corporate business plan including initial Organization, Customer, and Product information, establishing the business operations foundation including those that generate revenue. The first stage (this project) focuses on generic research and development, defining the initial "what" questions, and strategically focused on developing limited information for the Organization, Customer, and Product sections. The expenses for this stage are almost zero, since the stage involves personal research time and costs for copying research materials. This minimizes outgoing costs while still developing the business plan. Furthermore, my personal skills and assets meet the associated Human Resource, Information Technology, and Non-IT resource requirements. The successful completion of this stage will then serve as the foundation for the next stage.

The next stage in the Business Development & Start-Up Program is the further development of the business plan. Like the preceding stage, it focuses on generic research and development, refining the "what" questions, and strategically focused developing the expanded information
for the Organization, Customer, and Product sections. At this stage is when expenses may increase because of the further development. However, the donated time and capital of "business partners," people who I seek out to help further develop the plan and whose skills offset my weaknesses will meet the associated Human Resource, Information Technology, and Non-IT resource requirements.

These are the first two stages of the Business Development & Start-Up Program, with each stage serving as the foundation, but also control for further development. Once the business is established and operational, the Business Development & Start-Up Program will be complete. The next stage is the Business Expansion/Improvement Program, which establishes the foundation for business expansion and improvement, including reducing costs and increasing revenues. The program is broken into the same stage categories as the Business Development & Start-Up Program. By following the same procedure, the subsequent development can be improved and expedited as the company learns and adapts to the dynamic market.
CHAPTER THREE

FINANCIAL INFORMATION

As stated earlier, focused research on the specific financial requirements cannot begin until the Organization, Customer, and Product Information sections are further along and their requirements identified, speculatively scheduled for Stage 2 (and this project is only Stage 0). Therefore, there is no detailed financial information included.

Since this stage (Stage 0) focuses primarily on research and development using personal resources, there are very little outgoing expenses. However, as the development process continues, the expenses will increase, anticipating that realizing real expenses occurring with Stage 2 starting. Because of the associated product development requirements, it is not expected that the associated asset requirements, other than skills, will be personally owned. Therefore, the company must begin formally acquiring assets while keeping the expenses to a minimum and establishing the foundation for the next stage, anticipating that the next stage (Stage 3) will experience a drastic increase in not only expenses but also company assets.
Although identifying the expenses is possible, their actual costs are dependent upon a variety of issues. Many of these issues relate to Environment Information, whose research is scheduled to begin in Stage 1.

However, anticipating the initial budget for the development process, except for venture capital, loans, grants, and interest earned, revenues are not expected to begin until Stage 4, and that will just be trickle funding. Therefore, the company will have high start-up expenses, but the realization of such expenses has been postponed as long as possible. This plan will then allow the company to go quickly from an outgoing funds operation (development & start-up) to incoming funds operation (operations) within a short amount of time, reducing the time to breakeven.

Acquiring funds for development and start-up will focus initially on grants and donated capital (equipment, skills), then seeking additional funding through venture capital and loans. Eventually, the company may issue stocks, but that process is beyond the scope of this project.
CHAPTER FOUR
ENVIRONMENTAL INFORMATION

Like the Financial Information, the focused research on the environmental issues cannot begin until the Organization, Customer, and Product Information more developed, speculatively scheduled for Stage 2. This is because the initial research can and should be done only after the initial Organization, Customer, and Product Information have been developed in order to properly define the appropriate Environment Information “what” questions. Furthermore, when the Environment Information reaches its second stage of development, real costs begin appearing (consulting, researching, registration, etc.) and therefore delaying this step is beneficial because it allows for the minimum of expenses while developing the organization and its products.

Environmental Information establishes the foundation for Financial Information through a series of “what” questions developed to conduct the feasibility studies: Technological; Operational; and Financial.

Addressing these questions requires extensive associated research. However, before conducting said research, defining the associated criteria is critical.
The criteria is established through the various associated "what" questions, scheduled for Stage 2 when focused development on the Environment Information begins.
CHAPTER FIVE
ORGANIZATION INFORMATION

Introduction

This information pertains specifically to the organization. With the exception of the vision and mission statements, there is nothing related to the products or customers.

Generic Information

General Information

In order to understand the organizations structure, establishing several related terminologies is essential. For this document, the term “enterprise” references both the top business overseeing the subsidiaries and to the collective of all subsidiaries and the top business. For this document, the term “business” references a small business unit of the enterprise.

Defining terminology, we can now explore the company’s structure. The company is structured as an enterprise with subsidiaries, each subsidiary representing an enterprise branch. The titles, duties, etc, are the same except that the title is either for the Enterprise or for a Subsidiary. The subsidiaries do not have Stockholders or Board of Directors levels like the
enterprise, because the Enterprise serves that role (Appendix: Organization Information).

The enterprise is first geographically and then sub-organized into sections structurally. The geographic limb leader becomes the respective "executive" for the
reporting positions. This is so that as the company grows, it will be easy to identity and organize the various branches as positional relationships. Because of the expansive nature of the enterprise, it and its subsidiaries will need to be registered. Therefore, the enterprise will first be registered and then as required, its subsidiaries in order to protect the respective intellectual property. During the initial stages, the enterprise and initial subsidiary are collectively managed as one organization until warranting separation, utilizing this process of unity then separation for all subsequent subsidiaries (Appendix: Organization Information).

Rather than utilizing the modern, traditional organization structure (CEO, CFO, CTO, CIO, COO, etc.), the organization structure of the enterprise and its subsidiaries are modeled after the Firefighting Resources of California Organized for Potential Emergencies (FIRESCOPE) Incident Command System (ICS) used throughout the United States as part of the National Interagency Incident Management System (NIIMS). There are several significant reasons for selecting this model.
Figure 2. Crimson Eagle Organization Positions/Titles
In today's global economy, flexibility is essential to success. The ICS has considerable flexibility. It can grow or shrink to meet dynamic needs. This makes it a very cost-effective and efficient management system, applying to a wide variety of situations. Furthermore, the structure is a modular organization. As long as an individual can simultaneously manage all of the major functional areas, no further organization is required. However, if one or more of the functions require independent management, an individual shall be delegated responsibility for said function. Therefore, the leader of the area will further assign individual tasks within the Unit as needed.

The structure also relies heavily upon knowledge management and empowerment, and in today's economy, empowerment is an important aspect of business operations. It is based upon the requirement that the system MUST be capable of handling both a small and large businesses. Today's business must be capable of easily expanding from very small, routine operations into a larger organization, to be capable of selective and total demobilizing or downsizing in an efficient manner, integrating all of these elements in the ICS model.
This organizational structure establishes the Chain of Command consisting of several layers: Command; Sections; Branches; Divisions/Groups; Units; and Resources (Appendix: Organization Information). The model adheres to a “form follows function” philosophy and structured around five major management functions (functional areas), known as Sections: Command; Intelligence and Planning; Logistics; Operations and Services; and Administration and Finance. The Intelligence and Planning Section predicts business magnitude and complexity based upon situation and resource data. The Intelligence and Planning Section, with the assistance of the Operations and Services Section lists alternative strategies. The Administration and Finance Section provides cost. The Logistics Section determines the likelihood of acquiring necessary resources. The Intelligence and Planning Section, or preferably, the Executive Management then estimates the probability of success for each strategy collectively (Appendix: Organization Information).
Cultural Characteristics Information

Part of developing a new enterprise is also envisioning its operational culture. I began defining the culture by creating an easily remembered slogan or catch phrase, but one with a deeper meaning than just the words. By using these slogans as a guide, the corporate culture is imbedded throughout the organization, from the highest management to the lowest employee level, the technician.
Customer Service is Top Priority! Since satisfied customers are essential to the enterprise’s longevity, the enterprise should strive to exceed the customer’s expectations, not to just meet them.

Information is Power; Share the Power. Gone are the days where the supervisor was the one with knowledge and the technicians are mindless; everyone must be educated and the enterprise must expand and improve the methods of communication. A better-educated employee improves customer education, leading to increased customer satisfaction, resulting in increased revenues and subsequently profits.

Empowerment is not just a Term, but a Method for Everyone being Successful. The enterprise’s employees are its strongest asset, therefore the enterprise must entrust them to do their job, and that includes sharing information. With empowerment comes responsibility, and therefore the enterprise shall promote an aura of honesty.

Quality Starts from the Beginning, not from the End. It is impossible to inspect quality into a product; therefore, quality must be designed into the product from the beginning, as the first step in the development process.
An Ounce of Prevention is Worth more than a Pound of Cure. By planning and keeping all of the relevant parties informed, long-term development costs are reduced and greater opportunities created. Furthermore, it is better to address potential problems early, then to have them show up later.

P2P². The first step is to develop a good plan; the second step is to perform to the plan. Intelligence and Planning is primarily responsible for the first step, whereas the Operations and Services is responsible for the second step. However, all of the sections must be kept informed throughout the process in order to address special situations.

Perfection is not Cost Effective, but good Enough is. Too much time and money can be spent trying to develop the perfect plan. It is better to develop a plan that is strong enough to address the needs, yet flexible enough to evolve and take advantage of future unknowns.

Turn Problems into Opportunities. Every problem is an opportunity when viewed properly. Problems find the enterprise and are detrimental, whereas opportunities are potential chances for shining moments.
Work Smarter, not Harder. By using their knowledge, employees and the enterprise will achieve a better return on their work efforts.

Develop ways to Increase Productivity or Decrease Expenses, Rather than to Eliminate Jobs. By constantly thinking of better ways to conduct operations, productivity will increase, expenses decrease, and new opportunities for generating revenues will develop.

Kiss a Lot of Frogs to Find a Few Princes. Failure is "ok"; the important thing is to learn from past mistakes.

Mutual Respect is not just a Term, but also the way of Conducting Business. Not only are our employees our most valuable asset, but they are also the bond with our customers. Therefore, treating both with respect promotes community equality and unity.

However, slogans are not enough; there also needs to be some basic guidelines for conducting business, helping to shape the corporate culture. One of the most important guidelines is to return messages within 72 hours. This demonstrates mutual respect, but also goes towards making customer service the top priority. Furthermore, conducting all business in a reasonable manner and using common sense are required.
Another advantage of starting a new enterprise is the opportunity of taking advantage of new technology. With the globalization of markets and the increasing importance of being environmental friendly, "green" organizations are becoming more common. Therefore, by developing the enterprise as a "paperless" office from the beginning and promoting a culture of using environmental friendly products, such as recycled paper for printing, when necessary and recycling waste as much as possible, the enterprise will become better able to increase its goodwill value.

The last element of developing the business culture is related to industry quality assurance benchmarks. As an international enterprise serving the global market, there are a multitude of awards and certifications. It is not cost feasible to meet the requirements of all of them. However, the enterprise will attempt to integrate the standards of the top three into its operations. Although the enterprise's specific geographic origin has yet to be determined, the international benchmarks have been identified. These markets of business benchmarking for quality are North America: Malcolm Baldridge Award; Europe: ISO Certification and Japan: Edward Deming Award. The reason for doing this is to establish the benchmark
for guiding the enterprise into becoming a global industry leader. However, such integration will depend upon the current market. Allowing the enterprise to grow accordingly, while focusing on those aspects that are most beneficial to its expansion.

Organization Sampling

Now that we have established the enterprise culture, we need to identify some of its subsidiaries. Although only one subsidiary will initially be founded, the idea behind identifying others is to demonstrate the overall growth potential of the enterprise and why the aforementioned structure is most suited. The following is just a sampling of the subsidiaries to be developed:

- General Organization Model
- Crimson Eagle Academy
- Crimson Eagle Global Enterprise
- Crimson Eagle Global Academic Resources
- Small Office/Home Office Consulting

Specific Information

Questions

In order to develop an organization, there are several generic questions pertaining to each organization that require addressing (Appendix: Questions - Business
Sections). The following section limitedly develops a couple of the organizations in order to demonstrate the application of the development process, organization identification, and question answering.

Limited Organization Information

General Organization Model. The enterprise's vision is developing into a publicly traded, international, multi-dimensional organization. Although this vision takes time to achieve, it is important to recognize the vision in order to develop the enterprise strategy. With the foreseeable exception of the Board of Directors and stockholders sub-groups, the remaining sections of the enterprise follow the aforementioned ICS management organization system. This is important in order to establish the organizational framework necessary to manage the growing business.

The first step is filling the essential General and Command staff positions first, then filling unit level positions as required. Each General Staff position represents a Section: Command; Chief of Intelligence and Planning; Chief of Logistics; Chief of Operations and Services, and Chief of Administration and Finance, collectively known as Executive Management. The Command staff positions are Information Officer, Liaison Officer,
and Safety Officer (Appendix Reference: Organization Information).

With a growing organization, it is better to overestimate the need for a larger organization than to underestimate it. In addition, the initial expansion should provide positions that cover at least the following activities: Check-in; Resource Tracking; and Logistical Support. It is important to monitor growth and maintain good Span of Control, keeping all organization elements within the Span of Control Guidelines of between three and seven persons or elements reporting to a supervisor (A ratio of 5:1 is the model to follow whenever possible).

Span of Control pertains to the number of individuals one supervisor can effectively manage. Maintaining an effective Span of Control is particularly important where safety and accountability have top priority. The Span of Control for any supervisor falls within the range of 3 to 7. If a supervisor has fewer than three people reporting, or more than 7, some adjustment to the organization should be considered. The rule of thumb for Span of Control is one supervisor to five subordinates.

However, just like knowing when to add additional organizations is important, it is equally important to recognize and therefore release organizational elements.
when no longer needed, paying close attention to avoiding over-organization. Anytime a position is demobilized, the function it was performing goes to the next higher level in the Chain of Command. Part of avoiding over-organizing and maintaining a clearly organized structure, it is critical to avoid combining organizational positions. It is possible to assign one person more than one function on the organization chart; HOWEVER, functional positions should not be combined within the organization.

Stockholders. The Stockholders organization is the generic representative group of people who are interested in the enterprise’s continued well-being. There are initially two broad categories: Alliances and Clients. Alliances are the group with whom the enterprise has developed strategic partnerships. Clients are the group of people whom (repeatedly) utilizes the enterprise’s products. Clients are then further categorized as defined in the Customer Information section. Although they do not have a formal voice within the organization, it is important to remember that for the enterprise to prosper it must identify and serve in the best interest of Stockholders, which is why they are generically defined here. The full development of this group is beyond the
scope of this project, but is included here to demonstrate the thought process.

**Board of Directors.** The Board of Directors is the supervisory group of the enterprise Executive Management. This group represents the stockholders, providing guidance to the Executive Management. This group will follow the organization guidelines, but because this is a new business, a formal BoD will not exist until deemed necessary. The voting membership will follow the $5 + 2$ organization guidelines. The voting membership shall consist of the enterprise Chief Executive Officer who is also the Chairman of the Board. The remaining board positions shall consist of an elected enterprise Executive Officer and elected Shareholder Representatives. One Shareholder representative will be elected to serve as the Vice-Chair of the Board. There shall also exist up to a maximum of four Ex-Officio (Non-Voting) members, three of which are general members and the BoD Secretary. The specific duties of these positions are beyond the scope of this project.

**Executive Management.** The Executive Management group is a unified command, representing each of the business functional areas (also known as Sections). As a group, they contribute to the process of: Determining overall
goals and objectives; Selection of strategies; Ensuring that joint planning for tactical activities is accomplished in accordance with approved enterprise goals and objectives; Ensuring that integrated tactical operations are conducted; Making maximum use of all assigned resources; and Financial responsibility. There are five sections: Command; Intelligence and Planning; Logistics; Operations and Services; and Administration and Finance. Command is responsible for setting objectives and priorities, has overall responsibility at the company, and has overall responsibility for the management of organization activity. Intelligence and Planning is responsible for developing the action plan to accomplish the objectives, collecting and evaluating information, and maintaining resource status. Logistics is responsible for providing support to meet company needs and providing resources and all other services needed to support the company. Operations and Services is responsible for conducting tactical operations to carry out the action plan, developing the tactical objectives, organization, and directing all resources. Lastly, Administration and Finance is responsible for monitoring company costs and providing accounting Procurement Time recording Cost analyses. The responsibilities of these sections are very
interrelated, making communication essential for effective management.

The Chief is the person in charge of these sections. The Chief’s expanded duties are beyond the scope of this project, but an outline is included in the appendix (Appendix Reference: Organization Information - Positions).

As a small organization, one person, the CEO, may manage these major activities. As the company grows, these functions shall be set up as separate Sections within the organization, sub-dividing as needed. This organization has the capability to expand or contract to meet the needs of the company. A basic operating guideline is that the person at the top of the organization is responsible until delegating authority to another person. Thus, on smaller situations where additional persons are not required, the CEO will directly manage all aspects of the business.

The General Staff reports to and supports the Command. Section deputies shall have the same qualifications as their respective Chief, and may work directly with their Chief, serve in relief of their Chief, or perform certain specific assigned tasks.

Enterprise Information. The name of the enterprise is Crimson Eagle Global Enterprise (CEGE). The enterprise is
a multi-dimensional organization that produces subsidiaries and provides general guidance and support for subsidiaries. The enterprise (as a collection of businesses) provides a multitude of related and non-related products, existing throughout the world, offering a variety of markets, serving a global community. Therefore, CEGE's vision is:

Crimson Eagle Global Enterprise is a financially profitable, global, honorable, industry leading, innovative, versatile organization providing a variety of affordable, yet premium quality, on and offline products while excelling in customer service. The vision statement establishes what CEGE wants to be, in what marketplace, and what methods it will use to achieve its goals. Although CEGE's vision does not specifically define target market, it does identify several other key factors: Products and Applications (Services); Desired Competence Level; Vertical; and Geographical. Each subsidiary's vision will be modeled in a similar fashion, but further specifying the target market.

As discussed earlier, CEGE is an enterprise, whose primary products are subsidiaries (Appendix Reference: Organization Information). However, before creating a
subsidiary, its skeleton will be developed according to established procedures.

**Subsidiary Information.** The name of this subsidiary is Crimson Eagle Global Academic Resources (CEGAR). CEGAR is a multi-dimensional organization that gathers, analyzes, organizes, develops, and disseminates information and supplementary resources directed towards the global higher education academic community. Initially, CEGAR will target the restricted higher education academic community, but will eventually serve the extended community. Therefore, CEGAR’s vision is:

Crimson Eagle Global Academic Resources is a diverse, financially profitable, honorable, industry leading, innovative, organization serving the global higher education academic community by providing a variety of affordable, premium quality, on and offline products while excelling in customer service.

The vision statement establishes what CEGAR wants to be, its target market, and what methods it will use to achieve its goals. Like all subsidiaries, CEGAR will be developed and managed first internally from CEGE, but as it grows and evolves, will eventually become managed as relatively autonomous business unit, but following the
organization guidelines and general guidance provided from CEGE.
CHAPTER SIX

CUSTOMER INFORMATION

Introduction

This section pertains specifically to the customers. It includes general information (classifications and terminologies), sampling, and developed limited customer information.

Generic Information

General Information

In order to effectively develop and market products, properly identifying the customer is essential. In order to understand the customer organization, establishing several related terminologies is important. For this document, the term "customer" references someone who singularly or indifferently utilizes a company product, whereas a client is someone who repeatedly or preferably utilizes a company product. This distinction is important because the company's long-term future financial profitability depends significantly upon the positive public relations and word of mouth associated with repetitive product utility by returning customers. The company's goal is to build long-term relationships with customers, converting them into clients. Therefore, all

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clients are first customers, but the goal is to convert customers into clients.

Now that the terminology has been defined, we can explore how the customers will be organized. There are several different customer categories. The hierarchical structure is branch, division, and then department, using this organization theme throughout the organization wherever possible. There are several branches: Alliances; Government; Stockholder; Supplier; Specific Company; and Specific Customer.

The Alliances category represents the external organizations with which the company has developed a mutually beneficial relationship. The Government represents any government agency (such as the tax and employment) with which the company works with, either because of governmental jurisdiction and regulations or because in a revenue generating, cooperative, working capacity. Stockholders are a generic group of people (not otherwise categorized) who are interested in the enterprise’s continued well-being. Suppliers are the external organizations with which the company acquires operations resources. The next category is a Specific Company, which is a specific company (either the enterprise or a subsidiary). Lastly, a Specific Customer
represents someone not previously categorized as a member of the other customer branches. Each specific customer will be its own Specific Customer Branch.

By classifying the customer categories, it will be easier to develop and market products based upon commonalities within the groups. The Customer’s Products range from information to physical products to financial transactions.

Now that the Customer branches have been defined, each is further categorized by divisions. The Customer divisions are universal which further facilitates the development of products and markets. The divisions are Primary, Secondary, and Tertiary.

The Primary (Restricted) is the initial phase level of market targeting. This level establishes a rapport with the customer, building a foundation from which future expansion will grow. The Secondary (Expanded) is the 1st phase/level of expansion or extension from the Primary (Restricted) Level. This is expanded developed information: only answer the second group of relevant questions in order to further define and establish the specific customer. This establishes some operational and tactical customer information. This information is beyond the scope of this project, but some notes are included to
demonstrate the process. The last division, Tertiary, represents any subsequent levels of expansion or extension from the Secondary Level. This completes the initial development of the customer, finishing the foundation for the operational and tactical customer information. This information is beyond the scope of this project, but some notes are included to demonstrate the process. By further categorizing the Customer divisions in this manner, initially developing their initial strategic outline, I am facilitating product and market focus throughout development.

Customer Sampling

Now that we have established the foundation for customers, we need to identify some specific ones. There are several customer categories, each with their own requirements and relationships with the enterprise. However, their identification and development follow the same procedure. This makes developing the customers' products easier and helps facilitate the importance of interrelationships. The following is just a sampling of the customers and their respective categories to be developed:
Questions

In order to develop a customer, there are several generic questions pertaining to each customer that require
addressing (Appendix: Questions - Business Sections). The following section limitedly develops a couple of the customers in order to demonstrate the application of the development process, customer identification, and question answering.

Limited Customer Information

An example of developed Limited Customer information is the Higher Education Academic Community. However, before going into too many details, like Organization, first establishing the terminologies is essential. Using the U.S.A education classification system as the foundation, there are two branches: Lower and Higher Levels. The Lower Level is divided into Primary Education: Kindergarten through 8th Grade; and Secondary Education: 7th grade through 12th grade. The Higher Level is divided into Undergraduate Post-secondary: Associate’s degree and Bachelor’s degree; and Graduate Post-secondary: Master’s degree and Doctorate degree. Lastly, community is a group of closely interactive and related people. The premise of this distinction is that by properly defining and identifying the target market, products can be properly developed. It is important because the two branches serve different purposes in the educating its students.
Therefore, this customer, the Higher Education Academic Community consists of two branches: Individuals and Organizations. Although there will inevitably be many commonalities between the branches, developing and products will have different requirements. However, each branch is divided in the same manner: Primary; Secondary; and Tertiary. The Primary (Restricted) represents those customers directly associated and physically located within the academic institution’s campus. For Individuals that is Administration, Faculty, and Students, which may also become the departments. For Organizations, that is Administration (Student assistance and support), Faculty, and Student. Examples of Administration organizations include Career Center, Curriculum, Financial Aid, Housing, and Study Abroad. For student organizations, examples include Greek Society, Student Clubs, and Student Government.

The Secondary (Expanded) is the first extension of the Primary category including the surrounding community. Examples for Organizations include the extension (Parent/Sibling) Organizations of the On Campus Groups, Curriculum Reviews, Student Discounts Opportunities, and Business Associations. Lastly, Tertiary represents any
subsequent expansion or extension from the Secondary Level.

**Limited Government Information**

Another example of developed Limited Customer information is the Government Revenue Service. Although the enterprise will exist globally, I anticipate that wherever a branch is established, the business will be responsible for paying taxes to the local government. However, the specifics regarding taxation will depend greatly upon the local regulations. The Government Revenue Service consists of two divisions: Corporate and Personal. It is the goal of the company to conduct as much of its business with this customer electronically to the fullest extent possible, taking advantage of the speed, ease, and cost efficiency of electronic data interchange. Because the specific location of the enterprise has yet to be selected, this customer cannot be developed. Therefore, it is beyond the scope of this project, but was included as an example of development process and an alternative specific customer.
CHAPTER SEVEN
PRODUCT INFORMATION

Introduction

This information pertains specifically to the products and services. Since all products include services, and services are products, henceforth both are products. Because of the organization of the enterprise, there are wide ranges of related projects to be either acquired or developed. By first identifying the intended customer, the enterprise can then focus on products directly related to the relationship between the enterprise and the customer. The complete identification of products is beyond the scope of this project; however, this section provides the skeleton for the product development.

Generic Information

General Information

This is information applies to all products. It includes branding guidelines, etc.

A product is a good either acquired or developed to fill a specific need intended to increase or enhance revenues, productivity, information functions, or "goodwill." The information functions are collection,
analysis, organization, research, storage, and dissemination. Since information involves the communication elements and feedback, there are several applicable tools: E-mail; Web based self-help; Relational Database Management Systems; and E-file transfer, which all relate to Electronic Data Interchange (EDI). The Product branches are Revenue, Goodwill, Support, and Multi-Purpose.

The Revenue products are acquired or developed to directly generate revenue. It includes products that may generate revenue from one customer, but offered "free" to another. For instance, the limited product may generate goodwill, but the extended product generates revenue. Goodwill products are acquired or developed to promote goodwill, indirectly generating revenue, offered free to all customers, but used to build product loyalty. Support products are developed or acquired to support revenue generating or goodwill operations. Lastly, Multi-purpose products are any products that cannot be directly categorized into one of the other branches. However, the development of their subcomponents will be categorized in one of the three previously branches.

There are three product divisions. Online/Internet based products are primarily online (internet) based.
Offline/“Stand-alone” based products are primarily offline (stand-alone) based. Finally, Integrated products are an integrated combination of both on and offline components.

Several guidelines apply to product acquisition and development. In general, product development shall follow a project management approach, coupled with the general application of product development (Appendix: Expanded Project Information). Furthermore, wherever possible, developed products shall be offered in multiple languages.

One of the most important aspects of products marketing is establishing a brand. Therefore, there are several, generic branding guidelines that apply. All products shall be branded; first under the company name, then, as appropriate, under a product family brand name. A "brand book" shall exist as a living document, for details see Appendix: Brand Book Information. Due to its extensiveness and as a living document, designing a related database will allow for the quick and easy retrieval and update of relevant information.

**Product Sampling**

Now that we have established the foundation for products, we need to identify some specific ones. There are several product categories, each with their own requirements and relationships with the enterprise.
However, their identification and development follow the same procedure. This makes developing the products easier and helps facilitate the importance of interrelationships. The following is just a sampling of the products and their respective categories to be developed:

- Revenue
  - Online
    - Internet access (ISP)
  - Offline
    - Mentor Program Development (Improvement Consulting)
    - Campus Wide
    - Department Specific
      - Student Government Training
  - Integrated
    - Smart Card Campus and Community
    - Business Administration Academic Resources
    - Management Functions Specific Software
      - Accounting/Financial Management
      - Geopolitics
- IT Management
- Marketing Management
- Operations/Logistics Management

- "All in One"

- Goodwill
  - Web Site
    - A web-centric resource location providing a variety of information and other virtual services for the target market.

- Support
  - Financial Management support applications
  - Resource Management support applications

- Multi-Purpose
  - Online
    - Information searches
      - Jobs for college students
        - Internships
      - College
        - Study Abroad
      - Housing
        - Roommate

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• Financial Aid
• Discounts
  • Email accounts
  • Online Chat (Voice)
  • Internet Telephony
  • Backup/Restore
    o Offline
    o Integrated
      • Generic web site related services
        • Development
          o Consulting
          o Self-development
        • Hosting
        • Maintenance
  • Student Discount Shopping Programs
  • Games Hosting

Specific Information

Questions

In order to develop a product, there are several generic questions pertaining to each product that require addressing (Appendix: Questions - Business Sections). The following section limitedly develops a couple of the products in order to demonstrate the application of the
development process, product identification, and question answering.

Limited Product Information

The first example of a limitedly developed Product is "Alternate Reality," a software package that simulates a business universe allowing students to apply financial, marketing, production, and strategic management skills. The premise of this product is to provide an environment for students to apply their skills in a virtual marketplace. Because of the various skills applied, this product is actually a combination of several integrated products, each focusing on applying a specific set of management functions. This product serves the academic community business schools, secondary and post-secondary education levels.

There are several product characteristics. First, the interfaces (administrative & participant) easily ported to multiple languages. This will increase the marketability of the product, but also facilitate design since only the interface needs to be multi-lingual, not the actual coding. Secondly, the software utilizes client/server technology for reporting and receiving results. Thirdly, the universe is very robust and easily configured for re-playability. This creates opportunities for multiple
winning strategies. Furthermore, the software must handle various universe sizes (number of competing firms) and grant cross-universe interaction. Increasing the products dynamics enhances both re-playability and marketability.

This product is categorized as Revenue: Multi-Purpose. It is Revenue generating because of its potential and development cost. It is Multi-Purpose because although it is software based (user configuration, input decisions, result reporting) it also requires the users to analyze and discuss the results, developing a strategy for the next decision. Since this is a multi-component product, each component will also be developed and marketed as individual products. Therefore, this product and the sub-components are developed synchronously. In essence, this product is actually multiple products rolled into one. Therefore, each sub-component must be individually developed, but coordinated and integrated with this all-encompassing product.

Another example of a limitedly developed Product is Web Services, a product providing web site consulting, development, hosting, and maintenance. This product will provide an easy access, efficient, industry leading, secure, online (physical & virtual) presence and services
that serves as a resource for past, present, future, and potential higher education students, families, and student organizations. This is broad product, composed of multiple components. Each component is a product itself and developed accordingly.

Categorized as Revenue: Multi-Purpose, this product is primarily online based, but also includes offline components. Furthermore, the full product version generates revenue whereas the limited version promotes goodwill. This combination increases the marketability while at the same time providing feedback for areas to improve or enhance.

Development of this product constitutes a project Program and beyond the scope of this project, but is included here as an alternative product example.

Lastly, while developing the products their resource requirements will be identified. These resource requirements fall into the Support branch of products, whose market is the employees themselves. However, several other types of Support products previously identified needed to conduct operations. Examples are hardware, software (Project Management, Financial Management, and Human Resource Management), and infrastructure. Wherever possible, these requirements will be met through
acquisition of existing technologies, rather than development. This will decrease costs, but also increase flexibility.
CHAPTER EIGHT

SUMMARY

This first stage of the business plan establishes the foundation for further development. With this organization, topics are focused, allowing for delegating of research and development, while establishing a uniform procedure that is both flexible and revisable. If I were to do this project again, I would again focus first on establishing the "what" questions, but perform more research regarding what sections need to be included. After establishing the section outline (Business, Financial, Environmental, Organization, Customer, and Product Information), and what information each needs to include, begin formulating the associated "what" questions.

The "what" questions facilitated the process by focusing on strategy, but also outlining operational and tactical information, which will be address later, but not initially. It is important to remain focused, but also to not lose "good" ideas, because they are irrelevant to the current section. The next stage of the project is reviewing the project stages, revising some sections, whereas other sections can continue. Furthermore, I could
recruit others, building a management team, delegating responsibility of sections, and facilitating the continued development of the business plan.
I. Board of Directors (BoD)  
a) The term used to describe the shareholder representative body in a corporation.

II. Broadcast  
a) The term used to describe the advertising category of utilizing traditional mass media (television, radio, etc.) to promote products.

III. Business  
a) The term used to describe a specific parental business entity. For purposes of this project, it is synonymous with Organization, Company, Corporation, and Firm.

IV. Client  
a) The term used to describe a consistent or repeat product user. For purposes of this project, it is synonymous with Client and Clientele. Whereas all Clients are originally Customers, for purposes of this project the terms are synonymous for ease of use.

V. Customer  
a) The term used to describe a first time, one-time, or sporadic individual (or organization) that either purchases or utilizes products.

VI. Detailed Information  
a) The term used to describe the subsequent expansion in the development scope.

VII. Enterprise  
a) The term used to reference the both the top business overseeing the subsidiaries and to the collective of all subsidiaries and the top business. For purposes of this project, it is synonymous with Association and Organization.

VIII. Expanded  
a) The term used to describe the initial expansion in the development scope. For purposes of this project, it is synonymous with Extended.

IX. Expanded Information  
a) The term used to describe the initial expansion of development information. For purposes of this project, it is synonymous with Operational Information.
X. Function
   a) The term used to describe the duties or responsibilities. For purposes of
      this project, it is synonymous with Activities.

XI. Global
   a) The term used to describe the market-operating spectrum. For purposes
      of this project, it is synonymous with International, Multi-national,
      Universal, and Worldwide.

XII. Information Technology (IT)
   a) The term used to describe the grouping of computer,
      telecommunications, and other electronic information exchange related
      equipment as well as the supporting documentation and infrastructure

XIII. Intellectual Property
   a) The term used to describe the grouping of registered trademarks, logos,
      patents, etc.

XIV. Limited
   a) The term used to describe the reduced development scope. For purposes
      of this project, it is synonymous with Primary or Restricted.

XV. Limited Information
   a) The term used to describe the reduced development information. For
      purposes of this project, it is synonymous with Strategic Information.

XVI. Non-Information Technology (Non-IT)
   a) The term used to describe the grouping all other equipment not
      previously categorized.

XVII. Organization
   a) The term used to describe the business collective. For purposes of this
      project, it is synonymous with Enterprise and Association.

XVIII. Primary
   a) The term used to describe the initial or main goal, objective, market, or
      target. For purposes of this project, it is synonymous with Limited or
      Restricted.

XIX. Project
   a) A term used to describe a development task.
XX. Publishing
   a) The term used to describe the advertising category of utilizing the traditional printed media (magazines, newspapers, flyers, etc.) to promote products.

XXI. Secondary
   a) The term used to describe the first level/phase/tier of expansion/extension of a goal, objective, market, or target.

XXII. Strategic Business Unit (SBU)
   a) The term used to describe a specific spawned (child) business entity. For purposes of this project, it is synonymous with Subsidiary.

XXIII. Tactical Information
   a) The term used to describe the subsequent expansion of development information.

XXIV. Tertiary
   a) The term used to describe the subsequent level/phase/tier of expansion/extension of a goal, objective, market, or target.

XXV. Webcast
   a) The term used to describe the advertising category utilizing the internet to promote products.
APPENDIX B

BUSINESS DEVELOPMENT OUTLINE
Introduction

This information pertains specifically to the developing the initial organization and contains the business development outline.

Business Development & Start-Up

1) Concept/Premise
   a) Establish the foundation of business and initiate operations, including generating revenues.

2) Description/Purpose
   a) The purpose of the Business Development & Start-up Program will fully develop the corporate business plan including initial organization, product, and customer information, establishing the foundation for business operations including those that generate revenue.

3) Stage 0: Conception/Identification
   a) Concept/Premise
      i) Generic Research & Development
      ii) Define the initial what questions
      iii) Strategic Focus
      iv) Limited Information
         (1) Organization
         (2) Product
         (3) Customer
   b) Description/Purpose
   c) Start-Up Budget
      i) What are the expenses?
         (1) Income/Outcome
            (a) What?
            (b) How much?
            (c) When?
            (d) Why?
   d) What are the requirements?
      i) Human Resources (generalists, broad knowledge skills)
         (1) Administrative
         (2) Finance
         (3) Management
         (4) Marketing
         (5) Planning
         (6) Project management
         (7) Operations
         (8) Research
ii) Equipment Resources
   (1) IT
   (2) Non-IT

iii) Other
   (1) Intellectual Property
   (2) Registration
   (3) Etc.

4) Stage 1: Definition/Design
   a) Concept/Premise
      i) Generic Research & Development
      ii) Further define initial what questions
      iii) Strategic Focus
      iv) Expanded Information
          (1) Organization
          (2) Product
          (3) Customer
   b) Description/Purpose
   c) Start-up Budget
      i) What are the expenses?
         (1) Income/Outcome
            (a) What?
            (b) How much?
            (c) When?
            (d) Why?
      ii) Minimum Expenses
         (1) Volunteer time
         (2) Individuals provide own resources
         (3) Individuals track personal time and money vested, but not compensated at this time by the company
   d) What are the requirements?
      i) Human Resources (generalists, broad knowledge skills)
         (1) Administrative
         (2) Finance
         (3) Management
         (4) Marketing
         (5) Planning
         (6) Project management
         (7) Operations
         (8) Research
      ii) Equipment Resources
         (1) IT
         (2) Non-IT
iii) Other
   (1) Intellectual Property
   (2) Registration
   (3) Etc.

5) Stage 2: Development
   a) Concept/Premise
      i) Specific Research & Development
         (1) Rapid prototyping
         (2) Market research
      ii) Further define what questions
      iii) Operational Focus
      iv) Detailed Information
         (1) Organization
         (2) Product
         (3) Customer

   b) Description/Purpose

   c) Operations Budget
      i) What are the expenses?
         (1) Income/Outcome
            (a) What?
            (b) How much?
            (c) When?
            (d) Why?
      ii) 1st Expansion of Expenses
         (1) Paid & Volunteer time
            (a) Paid time
               (i) Who?
               1. Independent Contractor
         (2) Company compensation for some time and resources
         (3) Acquire corporate assets

   d) What are the requirements?
      i) Human Resources (generalists & specialists, broad and specific knowledge skills)
         (1) Administrative
         (2) Finance
         (3) Management
         (4) Marketing
         (5) Planning
         (6) Project management
         (7) Operations
         (8) Research
ii) Equipment Resources
   (1) IT
       (a) Minimum necessary for development and testing
   (2) Non-IT

iii) Other
    (1) Intellectual Property
    (2) Registration
    (3) Etc.

6) Stage 3: Marketing/Testing
   a) Concept/Premise
   i) Specific Research & Development
      (1) Rapid prototyping
      (2) Market research
      (3) Full Development
   ii) Further define what questions
   iii) Operational Focus
   iv) Detailed Information Category
       (1) Organization
       (2) Product
       (3) Customer

b) Description/Purpose

c) Operations Budget
   i) What are the expenses?
      (1) Income/Outcome
      (2) What?
      (3) How much?
      (4) When?
      (5) Why?
   ii) Expanded Expenses
       (1) Corporate Assets
       (2) Paid time
           (a) Who?
               (i) Independent Contractor
       (3) Paid time
           (a) Who?
               1. Independent Contractor
       (4) Professional consulting
       (3) Registration
       (4) Company compensation for some time and resources
       (5) Acquire corporate assets
d) What are the requirements?
i) Human Resources (generalists & specialists, broad and specific knowledge skills)
   (1) Administrative
   (2) Finance
   (3) Management
   (4) Marketing
   (5) Planning
   (6) Project management
   (7) Operations
   (8) Research

ii) Equipment Resources
   (1) IT
      (a) Minimum necessary for development and testing
   (2) Non-IT

iii) Other
   (1) Intellectual Property
   (2) Registration
   (3) Etc.

7) Stage 4: Implementation/Roll-Out
a) Concept/Premise
i) Specific Research & Development
   (1) Rapid prototyping
   (2) Market research
   (3) Implementation/Roll-out

ii) Further define what questions

iii) Tactical Focus
   (1) Market penetration
   (2) Full operations

iv) Detailed Information
   (1) Organization
   (2) Product
   (3) Customer

b) Description/Purpose

c) Operations Budget
i) What are the expenses?
   (1) Income/Outcome
   (2) What?
   (3) How much?
   (4) When?
   (5) Why?
d) What are the requirements?
   i) Human Resources (generalists & specialists, broad and specific knowledge skills)
      (1) Administrative
      (2) Finance
      (3) Management
      (4) Marketing
      (5) Planning
      (6) Project management
      (7) Operations
      (8) Research
   ii) Equipment Resources
      (1) IT
         (a) Minimum necessary for development and testing
      (2) Non-IT
   iii) Other
      (1) Intellectual Property
      (2) Registration
      (3) Etc.

8) Stage 5: Feedback/Review/Improvement
   a) Concept/Premise
      i) Generic Research & Development
      ii) Define what questions
      iii) Strategic & Tactical Focus
      iv) Limited Information
         (1) Organization
         (2) Product
         (3) Customer
   b) Description/Purpose
   c) Operations Budget
   d) Other information
      i) “Sony Corporation” approach to evaluations
         (1) Major, minor, competition
Business Expansion/Improvement

9) Concept/Premise
   a) Establish the foundation for business expansion and improvement, including reducing costs and generating revenues.

10) Description/Purpose
    a) The purpose of the Business Expansion/Improvement Program will fully development the corporate business expansion/improvement plan including organization, product, and customer information.

11) Stage 0: Conception/Identification
    a) Concept/Premise
       i) Generic Research & Development
       ii) Define the initial what questions
       iii) Strategic Focus
       iv) Limited Information
           (1) Organization
           (2) Product
           (3) Customer
    b) Description/Purpose
    c) Expansion Budget
       i) What are the expenses?
           (1) Income/Outcome
               (a) What?
               (b) How much?
               (c) When?
               (d) Why?
       d) What are the requirements?
           i) Human Resources (generalists, broad knowledge skills)
               (1) Administrative
               (2) Finance
               (3) Management
               (4) Marketing
               (5) Planning
               (6) Project management
               (7) Operations
               (8) Research
           ii) Equipment Resources
               (1) IT
               (2) Non-IT
           iii) Other
               (1) Intellectual Property
               (2) Registration
               (3) Etc.
APPENDIX C

ORGANIZATION INFORMATION
Introduction

This section contains the various Organization Information related documentation.
Crimson Eagle
Executive Management & Sections

Command
Chief Executive Officer (CEO)

Executive Staff
- Safety
- Security
- Communications/Public Relations

Intelligence & Planning
Chief Intelligence & Planning Officer (CIPO)
(Research & Plan Development)

Operations & Services
Chief Operations & Services Officer (COSO)
(Operations & Production)

Logistics
Chief Logistics Officer (CLO)
(Resource Management)

Administration & Finance
Chief Administration & Financial Officer (CAFO)
Crimson Eagle
Intelligence & Planning

- Intelligence & Planning
  - Chief Intelligence & Planning Officer (CIPO)
  - (Research & Plan Development)

- DIPO
  - Deputy Planning & Intelligence Officer

- Demobilization Unit
- Documentation Unit
- Resources Unit
- Situation Unit

- Functions
  - Focused Quality Improvement Planning
  - Strategic Planning & Organization Development
  - Innovation Research & Development
  - IT Research & Planning
Products

Product Information

Revenue
- Online
- Offline
- Integrated

Goodwill
- Online
- Offline
- Integrated

Support
- Online
- Offline
- Integrated

Multi-Purpose
- Online
- Offline
- Integrated
APPENDIX D

ORGANIZATION INFORMATION - POSITIONS
Organization Information – Positions

Introduction

This section contains the various Organization Information related documentation.

XXVI. Command
a) Chief Executive Officer
   i) CEO
b) Focuses on establishing the vision for the organization
c) Performs the major organizational functions (Intelligence & Planning, Logistics, Operations & Services, and Administration & Finance) until determining that the authority for one or more functions should be delegated.
d) Responsible for all functions and company activity
   i) Either may perform all functions or delegate authority to perform functions to other people in the organization. Delegation does NOT relieve the CEO from overall responsibility.
e) Performs the Command Staff functions (Safety, Liaison, Information) until determining that the authority for one or more functions should be delegated.
   i) What are the Command Staff functions?
      (1) What are some notes regarding each command staff function?
      (2) Safety
         (a) Assesses hazardous and unsafe situations, and develop measures for assuring personnel safety.
         (b) May exercise emergency authority to directly stop unsafe acts if personnel are in imminent, life-threatening danger.
         (c) Only one Safety Officer shall be named, but may have multiple assistants.
      (3) Liaison
         (a) The point of contact for personnel from assisting or cooperating agencies.
            (i) Strategic Alliances contact point
            (ii) Agency Representative
1. An outside (external) agency that sends a representative to work with the management team to facilitate coordination between agencies.

2. They report to the Liaison Officer
   (b) Only one Liaison Officer shall be named, but may have multiple assistants.

(4) Information
   (a) The central point for dissemination of information to the news media, other agencies, and organizations.
   (b) Only one Information Officer shall be named, but may have multiple assistants.

(5) What are some notes regarding Assistants?
   (a) A level of technical capability, qualifications, and responsibility subordinate to their respective primary positions.
   (b) Used as subordinates for the Command Staff positions, particularly Information and Safety Officers.

f) May have one or more deputies, whether at the Command, Section, or Branch level, said deputy must be fully qualified to assume the position.
   i) What are some reasons to delegate a deputy?
      (1) To perform specific tasks as requested by the CEO
      (2) To perform the Command function in relief capacity, e.g., to take over the next operational period (in this case, the deputy assumes the primary role).

   g) Serves as liaison regarding the following out-sourced activities/functions
      i) Strategic Alliances

XXVII. Intelligence and Planning
   a) Chief Intelligence and Planning Officer
      i) CIPO
   b) Has the authority and responsibility to oversee all aspects of Intelligence and Planning
   c) Serves as liaison regarding the following out-sourced functions
      i) Strategic Alliances
      ii) Independent auditor
         (1) Quality improvement
XXVIII. Logistics

a) Chief Logistics Officer
   i) CLO

b) Has the authority and responsibility to oversee all aspects of Logistics

c) Serves as liaison regarding the following out-sourced functions
   i) Strategic Alliances
   ii) Resource Management
      (1) Equipment
          (a) General Maintenance
      (2) Human
          (a) Initial screening and recommendations
      (3) Recruitment
          (a) College Graduates
          (b) High school graduates
      (4) Personal
          (a) References
      (5) Information Technology
          (a) General Maintenance
      (6) Other
          (a) Custodial Services
          (b) Waste Management

d) Comprehensive Resource Management
   i) Resources may be managed as Single Resources, Task Forces, or Strike Teams. The use of Task Forces or Strike Teams is encouraged whenever possible to maximize the effective use of resources, maintain Span-of-Control, and reduce the telecommunications loads.
   
   ii) What are the resources categories?
      (1) Description
      (2) Single Resources
          (a) Include both personnel and their required equipment
      (3) Task Force
          (a) Any combination of single resources within the Span of Control guidelines. They are assembled for a particular tactical need, with common communications and a leader.
          (b) Can be pre-determined or assembled from available resources.
(c) It is a combination of mixed resources with common communications operating under the direct supervision of a Task Force Leader. They can be very versatile combinations of resources and their use is encouraged. The combining of resources into Task Forces allows several resource elements to be managed under one individual's supervision, thus lessening the Span of Control of the Division/Group Supervisor.

(4) Strike Team
(a) A combination of a designated number of the same kind and type of resources with common communications and a leader. The number of resources to be used in the team will be based on what is needed to perform the function.
(b) Span of Control guidelines should apply.
(c) Can be pre-determined or assembled from available resources.
(d) It is a set number of resources of the same kind and type with common communications operating under the direct supervision of a Strike Team Leader.

(5) Divisions and Groups
(a) Divisions and Groups are established when the number of resources exceeds the Span-of-Control of the executive.
(i) Divisions are established to divide the business into geographical areas of operation.
(ii) Groups are established to divide the business into functional areas of operation. Functional Groups are described as areas of similar activity (presentations, marketing research, etc.).

iii) What are some resource management guidelines?
(1) All resources must be assigned a current status condition.
(2) Tactical Resource Status Conditions:
(a) Assigned
(i) Resources checked-in and performing work tasks
(ii) Resources performing an active assignment
(b) Available
   (i) Resources assigned to the business and ready for an assignment.
   (ii) Resources ready for assignment (deployment)

(c) Out-of-Service
   (i) Resources assigned to the business, but unable to respond due to mechanical, rest, or personnel reasons.
   (ii) Resources not assigned or not available

(3) All changes in resource locations and status conditions must be made promptly to the Resources Unit.

(4) Changes in Status
   (a) Normally the individual who makes the change in a resource’s status is responsible for providing that information to the Resource (Status) Unit.

XXIX. Operations and Services
   a) Chief Operations and Services Officer
      i) COSO
   b) Has the authority and responsibility to oversee all aspects of Operations and Services
   c) Serves as liaison regarding the following out-sourced functions
      i) Strategic Alliances
         (1) Internet access
         (2) Other student friendly organizations
            (a) www.collegeclub.com
            (b) www.studentadvantage.com
            (c) www.edu.com
            (d) Financial Aid Sites
            (e) Workforce
               (i) Internship
               (ii) Educational Co-op

   (3) Why
      (a) Advertising
      (b) Membership privileges/discounts
      (c) Sales Commissions
      (d) Marketing Services
XXX. Administration and Finance
   a) Chief Administration and Finance Officer
      i) CAFO
   b) Has the authority and responsibility to oversee all aspects of Administration and Finance
   c) Serves as liaison regarding the following out-sourced activities/functions
      i) Strategic Alliances
      ii) Finance and Budget
          (1) Accounting
              (a) Controller
              (b) Bookkeeping
                  (i) Accounting and tax departments
                      1. Cost Accounting
                      2. Financial Accounting
                      3. Tax Department
              (c) Payroll services
                  (i) Direct deposit capability
      iii) Legal
          (1) Document research, finalization, and filing
          (2) Attorneys
          (3) Legal Documentation
      iv) Independent Auditor
          (1) Accounting
          (2) Administration
APPENDIX E

QUESTIONS — PROGRAMS AND PROJECTS
Questions – Programs and Projects

Introduction

This section contains the various questions used to develop each Program or Project.

Generic Information

General Information

The questions are categorized as either generic or specific. Generic questions are limited in scope, but apply to either “programs” or “projects.” Specific questions are categorized as expanded, specialized, or detailed. The expanded questions enhance the “program” or “project” scope, whereas the specialized questions are focused for either a specific “program” or “project.” The detailed questions are the last set of questions used to initially finish developing the “program” or “project”, completing the foundation for its full development.

Limited Questions

These questions focus on the basic essentials for either the “program” or the “project”, establishing its foundation.

1) What is the name of this specific “program/project”?
2) What are some “program/project” terminologies?
   a) What is the difference between “this” and “that”?
   b) Why is this distinction important?
   c) What is the premise of this distinction?
   d) What are the key words and phrases?
      i) What do they mean?
3) What is the premise of this specific “program/project”?
   a) What is the purpose of the “program/project”?
      i) What does the “program/project” accomplish/do/provide?
         (1) Goals
         (2) Objectives.
         (3) Milestones
4) What is the description of the “program/project”?
   a) What are the characteristics of this specific “program/project”?
   b) What are the key words and phrases?
      i) What do they mean?
5) What is this “program’s/project’s” mission/vision?
   a) What are the key questions?
      i) What is the “program/project”?
      ii) Where does the “program/project” want to be?
      iii) When does the “program/project” want to get there?
   b) What areas should the vision/mission statements address?
   c) What are the mission/ vision statements?
      i) Vision Statement
      ii) Mission Statement
   d) What are the key words or phrases?
      i) What do they mean?

6) How is this “program/project” organized?
   a) How are the “projects” of this “program” classified?
      i) Each category is defined as needed.
      ii) Project
         (1) Task
            (a) Work Unit
   b) “Program/Project” Branches
      i) What are the “program/project” branches?
         (1) Description
   c) “Program/Project” Divisions
      i) What are the “program/project” divisions?
         (1) Description
   d) “Program/Project” Departments
      i) What are the “program/project” departments?
         (1) Description
APPENDIX F

QUESTIONS - BUSINESS SECTIONS
Questions – Business Sections

Introduction

This section contains the various questions used to develop each business “section” (Organization, Customer, and Product) or “element” (Specific Organization, Customer, or Product). For these questions, replace either “section” or “element” with the respective “section” or “element.”

Generic Information

General Information

The questions are categorized as either generic or specific. Generic questions are limited in scope, but apply to either “sections” or “elements.” Specific questions are categorized as expanded, specialized, or detailed. The expanded questions enhance the “section” or “element” scope, whereas the specialized questions are focused for either a specific “section” or “element.” The detailed questions are the last set of questions used to initially finish develop the “section” or “element”, completing the foundation for the full project development.

Limited Questions

These questions focus on the basic essentials for either the “section” or the “element”, establishing its foundation.

XXXI. What is the name of this specific “section/element”?
   a) What components should the name include?
   b) What image should the name invoke?

XXXII. What are some “section/element” terminologies?
   a) What is the difference between “this” and “that”? 
   b) Why is this distinction important?
   c) What is the premise of this distinction?
   d) What are the key words and phrases?
      i) What do they mean?

XXXIII. What is the premise of this specific “section/element”?
   a) What does the “section/element” accomplish/do/provide?

XXXIV. What is the description of the “section/element”?
   a) What are the key words and phrases?
      i) What do they mean?
   b) What are the characteristics of this specific “section/element”?
      i) What do they mean?
XXXV. What is this “section’s/element’s” mission/vision?
   a) What are the key questions?
      i) What is the “section/element”? 
      ii) Where does the “section/element” want to be? 
      iii) When does the “section/element” want to get there?
   b) What areas should the vision/mission statements address?
      i) Whom does the “element” serve?
         (1) What is the market category and family?
         (2) Target Industry
         (3) Target Market Segment
            (a) What is the market definition of what the business does?
      ii) Products and Applications (Services)
      iii) Desired Competence Level
      iv) Vertical
      v) Geographical
   c) What are the mission/vision statements?
      i) Mission Statement
      ii) Vision Statement
   d) What are the key words or phrases?
      i) What do they mean?

XXXVI. How is this “section/element” organized?
   a) How are the “elements” of this “section” classified?
      i) Each category is defined as needed.
      ii) Branch
         (1) Division
         (a) Department
   b) “Section/Element” Branches
      i) What are the “section/element” branches?
         (1) Description
   c) “Section/Element” Divisions
      i) What are the “section/element” divisions?
         (1) Description
   d) “Section/Element” Departments
      i) What are the “section/element” departments?
         (1) Description
Specific Information

Specialized Questions

These questions are focused towards a particular “section/element”, further establishing its foundation.

Organization

XXXVII. What are some guidelines?
   a) Premise
      i) Increased profitability due to increased revenues and/or decreased expensed via the integration of acquired resources, product innovation, and client expansion and retention.
   b) Acquisition
      i) Competition
         (1) The acquisition of a competitor because of strategic resources or clients.
      ii) Resources
      iii) Clients
         (1) What are some notes regarding resource acquisition?
         (2) What are some notes regarding product innovation?
         (3) What are some notes regarding clients expansion and retention?

Customers and Products

XXXVIII. What are some notes regarding naming?
   a) What components should the name include?
      i) Industry
      ii) Market information

XXXIX. What are some notes regarding this “element’s” market?
   a) What is this “element’s” target industry-market?
      i) Whom does this specific “element” serve?
         (1) Market description
             (a) What does the target market desire?
**Expanded Questions**

These questions further develop the "section/element", building a bridge between strategy and operations.

XL. What is the strategy for this specific "section/element"?
   a) What is the premise of this strategy?
   b) What are some guidelines?
   c) What are the goals?
      i) Branches
         (1) Descriptions for each branch
         (2) Characteristics
         (3) Functionality
         (4) Market
      ii) For each branch, answer the following divisions:
         (1) Basic (Minimum)
            (a) Initial
            (b) Long-Term
         (2) Desired
            (a) Initial
            (b) Long-Term
         (3) Ultimate
            (a) Initial
            (b) Long-Term
   d) What resources are required to perform and support operations for this "element"?
      i) What are the resource categories?
         (1) Alliances
         (2) Equipment
         (3) Human
         (4) Intellectual Property
         (5) Other
         (6) Financial
      ii) What are the alliances requirements?
      iii) What are the equipment requirements?
         (1) What are the divisions?
            (a) Information Technology (IT)
               (i) Description
                  1. What is IT?
               (ii) Examples
                  1. Hardware
                  2. Software
3. Support
   a. Maintenance
   b. Training

4. Other Notes

(b) Non-Information Technology (Non-IT)
   (i) Description
      1. What is non-IT?
   (ii) Examples
      1. Building
      2. (production requirements)
      3. Other

iv) What are the human resource requirements?
   (1) What are the categories?
      (a) Staffing
      (i) Management
      (ii) Staff
      (b) Support
      (i) Recruitment
      (ii) Training
   (2) What are their skill requirements?

v) What are the intellectual property requirements?

vi) What are the other requirements?

vii) What are the financial resource requirements?

e) What are the key success factors?
   i) Description
      (1) What is a key success factor?

f) What is the schedule?
   i) Phase Number
      (1) Description of the Phase
      (a) What is the purpose of the phase?
      (2) What is the goal of the phase?
      (3) What are the objectives of the phase?
      (4) What are the milestones of the phase?
      (5) What are the key success factors of the phase?
      (6) What is the timeline of the phase?
Detailed Questions

These questions establish the foundation for the final development of the “section/element”, the last step between strategy and operations. This contains operational and tactical information, information used in the project development.

XLI. What is the plan to achieve the “section’s/element’s” goals?
   a) How will these goals be achieved?
      i) What are the objectives?
         (1) How will the objectives be achieved?
         (2) How will the objectives be evaluated?
         (3) How will the objectives be measured?
      ii) What are the milestones?
         (1) How will the milestones be achieved?
         (2) How will the milestones be evaluated?
         (3) How will the milestones be measured?
   b) How will the goals be evaluated?
   c) How will the goals be measured
APPENDIX G

EXPANDED PROJECT INFORMATION
Expanded Project Information

Project Development

Introduction

This section pertains to the process used to develop a specific Organization, Customer, or Product. Since each such development shall be organized as a project, this process combined with project management techniques shall be utilized.

The Ground Rules for Process Completion

The following are the steps for developing a project.

1) Project development rules.
   a) Follow the CPS model (See below).
   b) Develop the initial problem/goal statement. This is what the project will accomplish/do/provide. This could serve as a general model for the vision or mission statements.
   c) Throughout the entire process, compare the current section to the previously completed sections. However, if something is “thought up” that pertains to a different section, document it, and leave it alone. It will be addressed when the time is right.

2) The Process
   a) Phase 1: Problem/Goal Statement
      i) Primarily brainstorming and developing questions that ask “what” first, stating it as a task statement whenever possible.
   b) Phase 2: Information Compilation
      i) Step 1: Data Gathering
         (1) This step simply gathers as much relevant data and information concerning the task as possible.
      ii) Step 2: Data Organizing
         (1) This step organizes the data, compiling it into information.
      iii) Step 3: Data Analyzing
         (1) This step clarifies the information relevant to the project.
   c) Phase 3: Idea/Solution Generation
      i) Primarily brainstorming to generate ideas/solutions to answer the questions.
   d) Phase 4: Idea/Solution Evaluating, Prioritizing
   e) Phase 5: Implementation Plan Development
   f) Phase 6: Plan Implementation
   g) Throughout the process: Compare the current section to the previously completed sections. However, if something is “thought up” that pertains to a different section, document it, and leave it alone. It will be addressed when the time is right.
APPENDIX H

BRAND BOOK INFORMATION
Brand Book Information

Introduction

This section contains the outline of information contained in the Product brand book.

- Business Overview Documentation
- Annual corporate strategic plan
  o Most recent annual business review
- Annual business unit strategic plan
  o Most recent annual business unit review
- Annual brand strategic plan
  o Most recent annual brand review
- Corporate branding strategies and guidelines
  o Approved brand statements of marketing objectives and strategies
- Business Analysis Documentation
  o Marketing analysis and forecasts
    • Market shares and trends
    • Shipment trends
    • SWOT
      • External
        o Opportunities
        o Threats
      • Internal
        o Strengths
        o Weaknesses
    • Competition Evaluation
      • Product
      • Pricing
      • Promotion
      • Placing (distribution channels)
    • Advertising and Promotion Evaluation
      • Test marketing progress reports, reviews, and analyses
        o Product and services research and development progress reports
        o Budget and fiscal guidelines and status reports
- Marketing Mix Analysis Documentation
  o Approved sub-strategy statements
  o Approved plans
    • Archival of past approved plans
  o Review and analysis of implemented plans
    • Recommendations, suggestions, and lessons learned from the past
REFERENCES


