Created: 13 SEP 2019 by **Dr. John A. Gedeon** john.gedeon@gmail.com   Revised: NOV 2023

Business Consulting Services & Workshops
Dr. John A. Gedeon

This document contains a list of my business services followed by a brief description of each. At the end of this document is a table containing a list of workshops I have developed and offer.

PLANNING
- **Strategic Planning**
- **Strategic Plan Summative Evaluation**
- **Departmental-Level "Strategic Planning"**
- **Drafting Business Plans**
- **Critical Third-Party Reviews**

IMPROVEMENT INTERVENTIONS
- **Assessment & Evaluations**
- **Complex (Intractable) Problem Solving**
- **Organizational Improvement Interventions**
- **Terms of Reference (TOR) & Proposal Writing**
- **Project Management**

PROCESS PERFORMANCE
- **Process Improvement/Redesign**
- **Policy Development**
- **Procedure Manuals**
- **Document Template Design**
- **Staffing Levels Determination**

HUMAN CAPITAL DEVELOPMENT
- **Employee Engagement**
- **Training Needs Assessment & Plan**
- **Corporate e-learning System**
- **Transfer of Training**
- **Training & Development**

PLANNING

Strategic Planning
There are many strategic planning (SP) models but they all set the future direction of the organization by both asserting how their mission will unfold by anticipating or reacting to environmental forces that shape their markets or the organization itself. Before SP'ing, the activity was called "Long-term Planning," which was just an extrapolation of the past into the future for 10, 20, or even 30 years. Strictly speaking, you can only *plan* when all variables are under your control, like in a project. Many organizations just set strategic objectives while forgetting to *formulate* strategy—the heart of SP'ing. That can only be done if the current business model is producing the desired results and one is seeking incremental improvements. My system differentiates master strategies (and how they are formulated) from downstream/support strategies, the latter being how to achieve strategic objectives.

Strategic Plan Summative Evaluation

Many organizations are constantly moving from one five-year plan to another without ever achieving their vision. They never critically review their old plan for content, performance, or process to learn from their failures or successes and repeat the same mistakes in the next planning cycle. The literature has very little advice to offer on this topic, so I created a detailed evaluation model and published it in the book, *Quality Higher Education in the Caribbean* (2014). If you are near the end of your current planning cycle, I can assist you in analyzing it and distill lessons to be learnt, in addition to compiling a comprehensive report that will also serve as input for the next plan.

Departmental-Level "Strategic Planning"

It has become a trend for individual departments to draft their own 'strategic plans' within the framework of the organizational plans. Most heads at this level have little experience with strategic planning, and therefore many times, after a lot of effort produce an unworkable document. There are almost no guidelines for this process in the literature, so I researched and created a system called "Strategic Integration Plans," which demonstrate how the unit will support overall strategic initiatives, plus integrate other projects that will improve its own operational parameters (productivity, quality, cost-reduction, customer service, compliance with regulations, etc.), which may not be part of the formal strategic plan.

Drafting Business Plans

Whether you are a start-up of have been in business for a while, you will need to translate the 5-year strategic plan into a detailed 1 to 2-year operational plan. For start-ups, the primary audience will be investors and they will want to know that you have researched the industry/markets and competitors, created a viable business model (the strategy), identified and costed products and services, and how you will execute the plan with targets or standards for each function (operations, marketing, finance, HR, IT, security, etc.), the resources they will require, and align the budgeting process so funds are available as required. The sub-plans typically are marketing and sales plans, operations/production plan, management, organizational structure, staffing, financial plan and projections (with break-even analysis), reporting and evaluation systems.

Critical Third-Party Reviews

Have you just drafted a new strategic plan, strategy, business plan, policy, system, proposal, product/service, website, research report, a project or intervention/change management plan, terms-of-reference (for a new project), or similar initiatives? While a review by your legal team may be necessary, it is not sufficient to pick up on technical faults, unfounded assumptions, missing, incomplete, unnecessary, weak, contradictory, or redundant components, or errors in logic or systems thinking. As the designer/instructor of a doctoral course on critical thinking and an outsider with no internal political allegiance and not saddled with your industry or cultural paradigms, I will review your documents/products with a fresh set of eyes and provide a detailed report of findings in these areas to include the need to further research certain areas to resolve problems.

IMPROVEMENT INTERVENTIONS

Assessments & Evaluations

Before a major intervention one needs to make an *assessment* of the current situation to determine the deeper nature of the problem (not just the symptoms) and factors that are maintaining it in order to design an intervention that will solve or manage it. For complex problems, the Systems Thinking approach is often used. After the intervention is in place, *evaluation*(s) will need to conducted to measure its impact on the problem and if it is causing any unintended problems that need to be addressed. An evaluation can also be an audit of an existing system/process to see if it is performing as

it was designed to.

Complex (Intractable) Problem Solving

Organizations are often faced with complex problems and environments in which to operate. One hallmark of a complex problem is that no matter what you do to solve it, it keeps recurring (although the symptoms may subside for a while). *If you really think you know how a system works—just try changing it!* These problems are often approached with traditional linear, analytical thinking and intuitions about solutions which are often reactive and incomplete in scope. By using Systems Thinking, that is, examining the hidden or overlooked relational dynamics of system components and environmental forces, more successful and sustainable solutions can be found, while minimizing downstream or secondary problems, by using system tools to represent components, stakeholders, and system dynamics to determine high leverage intervention points and strategies to improve system performance or solve problems. I can either lead a team to solve such issues or train your people in System Thinking (ST) to build that capacity in-house. Besides problem solving, ST can be used in assessment, strategy development, exploring new opportunities, new system design, and evaluation.

Organizational Improvement Interventions

There are a plethora of organizational improvement interventions that are promoted as the silver bullet to your problems. Some of these interventions are: Total Quality Management (TQM), Kaizen, continuous improvement, ISO-9000, Six Sigma, business process reengineering, lean manufacturing, quality circles, Organizational Development (OD), teambuilding, restructuring, cultural change, training & development, leadership, incentives, job redesign, employee engagement, and many others. How does your firm select the appropriate intervention(s) to address a particular issue? After an assessment of the problem, I will be able to advise you on the most appropriate intervention, how it works, benefits to be derived, duration, costs, risks, and under which conditions it should be applied, and then help in the selection of consultants who specialize in that particular area.

Terms of Reference (TOR) & Proposal Writing

Over my 40+ years of consulting, I would say that about 80% of all TOR's (or Request for Proposals) require clarification questions from the consultant because they are poorly written. Often the organization (or author) does full fully appreciate the technical nature of the issues, prescribes solutions without understanding the root causes of the problems, or is not clear about outcomes, or duration. I can assist in writing a clear and comprehensive TOR. The flipside is writing a proposal in order to secure work or obtain a grant. If these are not written convincingly or comprehensively, at a competitive bidding price, your chances of securing a project are reduced. I have created a complete proposal writing system to include a detailed proposal template.

Project Management

I have completed the *Project Management Professional* (PMP) program, which is the gold standard for PM, which is sponsored by the Project Management Institute (PMI). I can assist at any stage of PM process, from researching and making the business case and charter for the project, planning in terms of scope, activities, scheduling, budget, quality, resources/procurement, risk identification, and stakeholder engagement, executing and monitoring the PM plan, or closing out the process to avoid post-project legal problems.

PROCESS PERFORMANCE

Process Improvement/Redesign

There is a popular misconception that a majority of organizational problems are due to staff with inadequate competencies or poor work attitudes. Research now demonstrates that up to 85% of workplace problems are due to dysfunctional processes. While HR attempts to addresses the staff problems, in most enterprises there is no unit that deliberately addresses process performance—the engine of productivity and quality. I would assist you in process improvement by first determining if incremental change, partial redesign, or complete re-engineering is warranted, then map current processes and issues, develop and roll-out out the new processes and evaluate them. If you want to develop that capacity in-house, I can assist in setting up and training such a unit that would promote and manage everything from continuous (incremental) improvement to radical reengineering.

Policy Development

Policies are some of the longest lasting guidelines for behavior in organizations, but as conditions change, they need to be updated. There must be a consensus on the nature of problem amongst most stakeholders before a new policy can be drafted. There will always be winners and losers when policies shift and their needs must be addressed to make it sustainable. For a policy to be enacted, I can also develop the process and supporting documentation that brings it to life or deals with those who violate it, which must be accessible and shared with all staff in some documented form.

Procedure Manuals

In many organizations it is not uncommon for procedures to be verbally transmitted or there may even be a situation where there are "practices" instead of procedures that vary from worker to worker. Procedure manuals can show new employees how to execute a task in terms of the steps involved and documents required in order to standardize best practices to ensure quality, cost, and safety concerns. It will periodically need to be updated as technology, methods, or policies change. I can create digital manuals where staff can quickly find the procedure they are looking for, even if they only use it occasionally.

Document Template Design

A source of many problems for employees, customers, or applicants are forms that are designed in a confusing manner. Many times they do not understand what is being asked of them, and therefore, insert incorrect information, or the instructions to complete the form are unclear or missing. Here is a fundraising proposal's old form, and then the redesigned template, and the template instructions. The new template provides much more information including checklists, so nothing is overlooked, it is formatted in much more organized, understandable, readable, and appealing manner.

Staffing Levels Determination

Some units are overstaffed and some understaffed. How do you know for sure that you have the correct level, as too many employees mean higher payroll costs, and to few, mean backlogs and poor quality as work is rushed. In principle, staffing should be equal to the workload, but that varies throughout the year, especially in seasonal businesses. One must also account for non-productive time like vacation, sick leave, training, meetings, and similar things in order to arrive at an optimal staffing level that does not incur excessive overtime. My system provides such answers that even the union will agree with as they are brought into the process to observe how standards are set for each task.

HUMAN CAPITAL DEVELOPMENT

Employee Engagement
In my academic paper on Employee Engagement (EE), I reveal research that shows only about a quarter of your employees are actually *engaged* in their work, that is, have a positive cognitive, emotional, and behavioral state that results in high performance work output. Employee *satisfaction* surveys are based on the assumption that *satisfaction* drives performance--which has been found not to be true. After an assessment, I can provide research-based approaches and interventions that make a significant difference to promote EE at your workplace.

Training Needs Assessment & Plan
Every year staff are sent on training but maybe not for the right reasons or to the right courses/ workshops. A training needs assessment can help identify competency gaps of staff and management, which can be triggered by poor performance at current tasks, as a requirement for new tasks, or for many other reasons. The assessment can go beyond annual appraisal recommendations and self-identified training needs and may involve data collection to confirm exactly which skills are needed and to what degree. This information can flow into the annual Training Plan, which will identify the source of the training (workshop, online, self-study, coaching, etc.), when and by whom it will be delivered/ conducted, and how it will be assessed, and the training budget. Some activities, of course, would be developmental in nature, as opposed to training.

Corporate e-learning System
Traditionally, classroom training workshops had been the answer to filling staff competency gaps. Unfortunately, many times they are not offered just-in-time before the skills are needed, can be disruptive of the employees work schedule for several days, and can be very expensive, especially if only one or a few staff need those skills. As a doctor of Distance Education, I can assess your current system and make recommendations and help to implement a more virtual and cost-effective system to upgrade staff skills on-demand and develop courses that are specific to your operations.

Transfer of Training
Research indicates that your employees only use (transfer) around 10% of what they learn in workshops, therefore you are effectively throwing away up to 90% of your training budget every year. This was my doctoral dissertation topic, and as an expert in this field, I can show your supervision and management how to boost this transfer rate significantly, which in turn, will directly enhance your operations.

Training & Development
Competent staff are part of any successful operation. I was the lead facilitator for Arthur Lock Jack GSB in the *Train-the-Trainer* program and can personally design and deliver skill-based workshops that are tailored for your industry/organization, with high transfer-of-training rates. Many of the workshops can have real-life project that solves one of your organizational issues afterwards, where they utilize their new skill in a structured learning environment where your staff can be coached. The following are the workshops that I teach clustered by topic.

…/

Workshops Offered

PLANNING	LEADERSHIP & MANAGEMENT
▪ Strategic Planning/Balanced Scorecard ▪ Strategy Formulation ▪ Drafting Business Plans ▪ Project Planning	▪ Leadership ▪ Mid-Management Skills ▪ Supervisory Skills
PROBLEM-SOLVING & INTERVENTIONS	**COMMUNICATIONS**
▪ Conducting Assessments (Organizational, departmental, process, problem/issue, etc.) ▪ Systems Thinking for Complex Problems ▪ Problem-Solving for Complicated Problems ▪ Organizational Improvement Interventions ▪ Project Management ▪ Conducting Evaluations	▪ Interpersonal Communications ▪ Public Speaking & Presentation Skills ▪ Designing *PowerPoint* Presentations ▪ Interviewing Skills ▪ Report Writing Skills ▪ Proposal Writing ▪ Drafting Terms-of-Reference for Projects
PROCESS PERFORMANCE	**TRAINING**
▪ Manpower Staffing Requirements ▪ Business Process Improvement ▪ Business Process Redesign ▪ Business Process Reengineering ▪ Standards/Performance Measurements/ Reporting Systems ▪ Policy Development ▪ Procedure Manuals ▪ Document Template Design	▪ Training Needs Assessment ▪ Developing an Annual Training Plan ▪ Workshop Design & Delivery (Train-the-Trainer) ▪ Post-Training Performance Assessments ▪ Corporate e-learning Systems ▪ Transfer-of-Training (getting staff to use what they learn in workshops) ▪ Blended Learning (classroom & online) ▪ Developmental (non-Training) Activities ▪ Training Logistics
PERSONAL SKILLS	**RELATIONSHIP SKILLS**
▪ Time Management ▪ Critical & Creative Thinking ▪ Strength Deployment Inventory (certified instructor)	▪ Coaching/Counseling/Conflict Resolution/ Confrontation ▪ Shaping Work Culture & Resistance to Change ▪ Customer Service

✎