

Required (X) Optional/Potential (O)

	Ops Transformation	PE Ops Due Dilligence	PE Value Creation	Supply Chain Restructuring	Op Model Redesign	Business Intelligence	Cost Takeout	General Ops Improvement	Client Tailored
<b>Phases</b>									
Discovery	X	X	X	X	X	X	X		
Strategy	X	X	X	X	X	X			
Planning	X	O	X	X	X	X	X	X	
Execution	X		X	O	O	X	O	X	
Advisory	O	X	O	O	O	O	O		
<b>Discovery Assessments</b>									
Value-prop Definition	X	X		O	X				
Performance Baseline	X	X	X	X	X	X	X	X	
Culture Baseline	X		X	O	X				
Capability Baseline	X	X		X	X	X		O	
Resourcing Baseline	X		X	X			X		
<b>Strategy Development</b>									
Operations Strategy	X								
Organizational Strategy	X				X				
Analytics Strategy	X	Specific strategies TBD pre- and post-deal depending on target investment / deal thesis					X		
Supply Chain Strategy	X			X					
Manufacturing Strategy	X			X					
Distribution Strategy	X			X					
Supplier Strategy	X			X					
<b>Planning Development</b>									
Opportunity Capture (exhaustive)	X	X	X	X	X		X	X	
Roadmap Development (multi-year)	X	O	X	X		X	X		
Strategic Planning (quarterly)	X	X	X	X		X	O		
Capital Planning / ROI Analysis	X	X	X	X		X	X	O	
Project Chartering (commissioning)	X		X	X		X	O	O	
<b>Execution</b>									
Interim Leadership (optional)	CTO/COO		CTO/COO/VP	COO/VP	COO/VP				
Management Office (TMO/PMO)	X		X	O			O		
Staffing & Executive Sponsorship	X		X	O			O		
Feasibility Planning (next 90 days)	X		X	O			O		
Playbook (monitor & manage)	X		X	O			O		
SWAT Team	X		X	O			O		
Executive Support (we coach)				O	O	O	O	O	
Implementation (we do)				O	O	O	O	O	
Recruitment-as-a-service (RAAS)	O		O	O	O	O	O	O	

**Strategic Ops Toolkit**

<b>Cost Management</b>	<b>4-Walls (Mfg. &amp; Distribution)</b>	<b>Supplier / 3PL</b>	<b>Operating Model</b>	<b>Technology &amp; Analytics</b>
Zero-based-budgeting (ZBB)	Facility Design & Layout	Make vs. Buy Analysis	Operating Model Baseline	IT Enablement (ERP/MES/WMS/Etc.)
Activity-based-costing (ABC)	Facility Overhead Assessment	Sourcing (RFI/RFP/RFS)	Business Process Reengineering	Enterprise Application Configuration
Cost-to-serve (Cost of complexity)	Process Improvements	Contracting	Role & Responsibility Assignment	Data Analytics Maturity Assessment
	5S / Visual Factory	Supplier Management	Systems Integration Design	Data Infrastructure Upgrades
<b>Supply Chain Network</b>	Labor Market Benchmarking	Monthly Scorecards	Reorganization	Data Engineering Framework Dev
Network Performance Baseline	Labor Planning & Shift Structure	ABR/QBR Design	Change Management	Data Visualization Implementation
Service Level Benchmarking	Lean / Waste Reduction	Joint Continuous Improvement		Dashboard Development Roadmap
Total Landed Costs Assessment	Processing Line Design	Business Continuity Planning	<b>Performance Management</b>	Dashboard Development
Network Modeling	Production Synchronization		Performance Baseline	Analyst Training
Product x Plant Assignment	Quality Systems (poke-yoke, SQC)	<b>Inventory Related</b>	KPI Effectiveness Assessment	
Business Continuity Planning	Sanitation/Maintenance	MTO/MTS Analysis	KPI / Incentive Development	
		Supply & Demand Var. Buffers	Operating Rhythm (cadence)	
		SKU Rationalization		