# An Integrated Strategy Consulting Firm



# Empowering SMEs with End-to-End Strategy and Execution

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## Module Wise

Anvikshiki | Consulting
An Integrated Strategy Consulting Firm

# Table of Contents
## Module Wise

# Challenges
## Why SMEs Struggle to Scale

**Uncleared Vision**
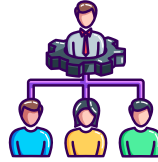
**Lacking Organisation Structure**

**Fragmented Process**

**Ineffective Marketing**

**Poor Monitoring & Visibilty**

**Change Management**

**Poor Financial Planning**

**Technology Adoption**

**Regulatory Challenges**

**Inventory Mismanagement**

**Inadequate Cashflow**

**Overexpanding Business**

# What We Do
## & How We Help

Anvikshiki | Consulting
*An Integrated Strategy Consulting Firm*

- ✔ Align a clear, purpose-driven vision to unify internal strategy & external communication.

- ✔ Designing scalable & sustainable structures & processes

- ✔ Develop a practical, data-backed strategic roadmap focused on sustainable growth

- ✔ Establish compliant & culture-driven HR policies to support employee engagement & retention

- ✔ Help design hiring, training, and retention frameworks for long-term team stability

- ✔ Optimize procurement with standardized vendor processes, PO systems, & cost controls

- ✔ Set up preventive maintenance systems to reduce downtime and extend asset life

- ✔ Build robust financial process for budgeting, control, and capital planning

# Why Us?
## Your Growth, Our Priority

## Business Tailored Solution

We understand the unique challenges of businesses and tailor solutions that are practical, scalable, & cost-effective.

## End-to-End Strategy to Execution

From vision-setting to implementation, we partner across the entire lifecycle — not just advise, but enable.

## Custom Frameworks, Not Templates

Every business gets a custom playbook based on its specific industry, size, goals, and growth stage.

## Integrated Growth Solutions

We offer holistic support across sales, marketing, operations, HR, and finance — all under one roof.

## People-Centric Change Management

We support leadership and teams through structured change programs, training, and alignment workshops.

# Our Process

## Build Operate Transform Audit

**Build** - We establish systems, processes, and teams tailored to the client's goals from the ground up.

**Operate** - We manage and optimize the setup to ensure stability and performance in the initial phase.

**Transfer** - We hand over control to the client with full training, documentation, and support.

**Audit** - We conduct periodic evaluations to ensure efficiency, compliance, & continuous improvement.

# Our Services
## We Provide Consultation In

**Vision Formulation**

**Strategy Formulation & Execution**

**Organisational Structure**

**Human Capital Mangement**

**Sales Enablement**

**Marketing Strategy**

**Corporate Finance**

**Process Digitalization**

# Vision Formulation

## Crafting the Future of Your Business

Clients often struggle to align daily actions with their long-term vision. We bridge this gap through our structured "vision-lens frameworks"—tools that help clearly connect their vision to everyday decisions and strategies.

## What is a Vision Statement?

A vision statement describes the desired long - term future of the organization.



## Quote

Vision without action is a dream. Action without vision is a nightmare – Japanese Proverb

# Vision Formulation
## Crafting the Future of Your Business

## Why Vision Matters

✓ Vision is the North Star guiding strategic direction.

✓ It inspires, aligns teams, and informs decisions.

✓ A powerful vision can differentiate and drive sustainable growth.

## Core Ideology & Envisioned Framework

| Element | Description |
|---|---|
| Core Purpose | The organization's fundamental reason for existence beyond just making money. |
| Core Values | Guiding principles and beliefs that shape behavior and decisions. |
| BHAG | A bold, clear, and compelling long-term goal that inspires and challenges |
| Vivid Description | A detailed, emotional picture of what achieving the BHAG will look and feel like. |

# Vision Formulation

## Crafting the Future of Your Business



# Common Mistakes in Vision Statements

✓ Too vague or generic

✓ Focused on profits, not purpose

✓ Confusing mission with vision

# Elements of an Effective Vision Statement



**Future-Focused -** Describes a desired long-term outcome

**Aligned with Purpose** - Reflects the organization's reason for being

# Vision Formulation

## Characterstics Vision Statement

**Foundations of Organizational Vision**
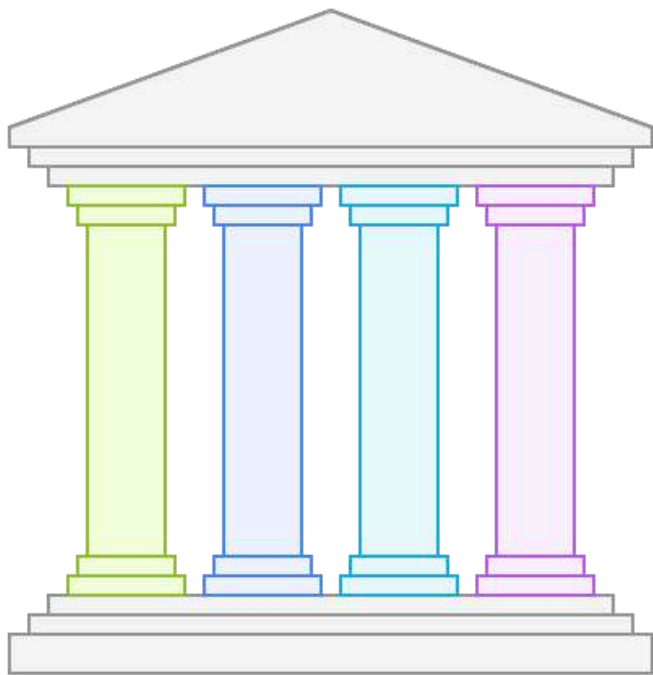
**Sustainability Commitment**
Emphasizes long-term environmental and social responsibility.

**Technological Innovation**
Showcases the organization's dedication to technology as a driver of change.

**Inclusive Empowerment**
Highlights the organization's goal to positively impact lives and ensure inclusivity.

**Potential Realization**
Reflects the organization's aspiration to inspire personal and professional growth.

## Breakdown of the Vision Statement by Example

**Google:** To organize the world's information and make it universally accessible and useful.

**Sony:** To experience the sheer joy of advancing and applying technology for the benefit of the public.

**Disney:** To be one of the world's leading producers and providers of entertainment and information.

# Vision Formulation

## The Golden Circle Framework

**Why –** Purpose, cause, or belief. The core belief of the business.

**How –** The process or values that set the business apart.

**What –** The product/service you offer.



Organizational Purpose Pyramid
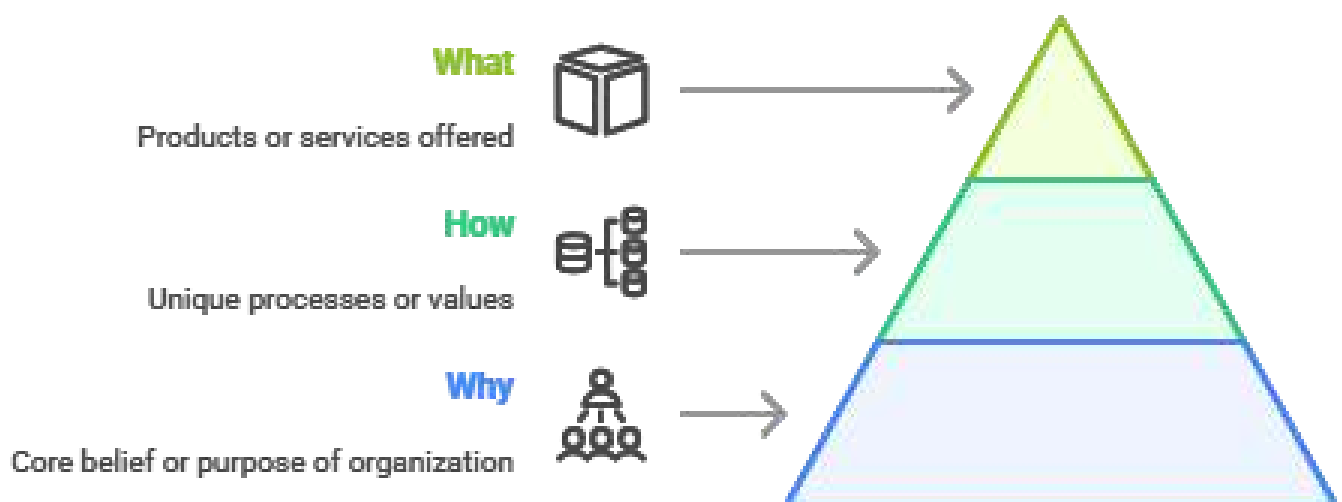
People don't buy what you do; they buy why you do it." – Simon Sinek.

# Vision Formulation
## Our Deliverables

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| S.No. | Deliverable | Description |
|---|---|---|
| 1 | Importance of Vision | A Strong vision is important to get clear goal setting for long term growth, aligning the employees and stake holder with shared future goal for an organisation working towards a common purpose. |
| 2 | Build to last by Jims Collins & Porras | Book reading by participant |
| 3 | Creation of a personalized workbook | It is an systematic workbook which will align with the role, goal and development path. It contains built-in templates, performance trackers, learning modules, and action plans. |

# Vision Formulation
## Our Deliverables

| S.No. | Deliverable | Description |
|---|---|---|
| 4 | Vision Session - Off site | Carrying out the vision sessions by Director / Promoter / Key Team Members to communicate the importance of vision to team and motivating them to hold the shared value towards the long term growth. |
| 5 | Post vision - Activities | How will an organisation will make thier vision live and streamlining across functionalities and integrating within KPIs, strategy and internal communication, embedding with inboarding and performance management system. |
| 6 | Advisory & Implementation on : Communication of the vision | Guiding and executing the communication of the vision allows all individuals to be aligned, have a shared objective, and become motivated. Making the vision clear motivates employees to visualize the long-term objectives, ensuring their engagement amd implementing strategic prespective in day to day decision making. |

# Strategy Formulation
## Creating a Competitive Advantage

## Purpose

Strategy Formulation is the process of defining a company's goals and creating a road-map aligning with company's vision.

## Levels of Strategy

- Corporate Strategy

- Business Unit Strategy

- Functional Strategy

01

02

03
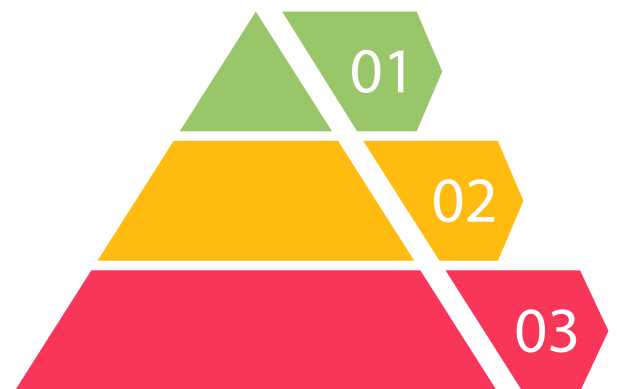
## Elements of Business Level Strategy

- Market

- Customer

- Product & Services

# Strategy Formulation

## Example of Business Level Strategy

### Maruti Suzuki Arena (Mass Market)

- ✔ Cost leadership through affordable and fuel-efficient models like Alto, WagonR, and Swift.

- ✔ Targets the mass market, especially first-time and price-sensitive car buyers.

- ✔ Focuses on wide service network and value-for-money positioning.

### Maruti Suzuki Nexa (Premium Market)

- ✔ Differentiation strategy with premium models like Baleno, Ciaz, and Grand Vitara.

- ✔ Targets aspirational and urban customers seeking style, technology, and experience.

- ✔ Offers a distinct premium retail experience with exclusive showrooms and services.

# Strategy Formulation
## Creating a Competitive Advantage

## Why Strategy Matters

✓ Businesses without strategy lack direction.

✓ Strategy helps allocate resources efficiently, outperform competitors & survive uncertainty.

## Quote

Strategy is about making choices, trade-offs; it's about deliberately choosing to be different." – Michael Porter

## Strategy vs Tactics vs Operations

| Element | Purpose |
|---------|---------|
| Strategy | Long-term direction and positioning |
| Tactics | Specific methods to implement strategy |
| Operations | Day-to-day processes and execution |

# Strategy Formulation

## Strategic Alignment Framework

It's the essence of aligning the market, customer, product & service with -

- ✓ Resources
- ✓ Process
- ✓ Profit Formula

## Strategy Alignment

- ✓ Internal Analsyis
- ✓ External Analsyis
- ✓ Sales Analytics

## Growth Formulation

- ✓ Target Setting
- ✓ Integrated Resources Planning
- ✓ Mid Strategy Review

# Strategy Formulation

## Frameworks for Strategy Formulation

### SWOT Analysis – Understanding Internal & External Factors

This framework helps organizations understand their internal capabilities & external environment, enabling them to make informed decisions and develop effective strategies.

## Strategic Analysis Framework
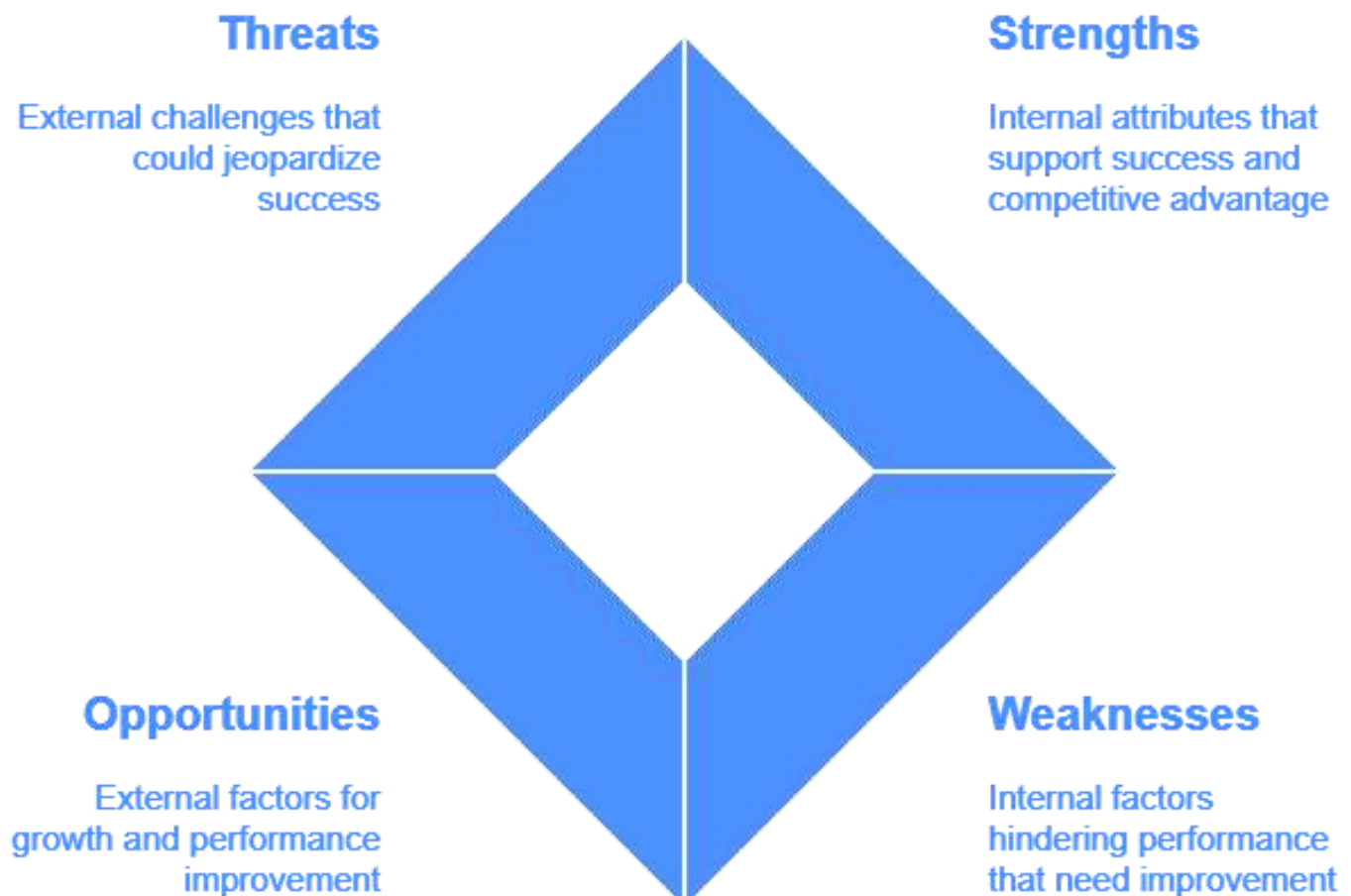
**Threats**

External challenges that could jeopardize success

**Strengths**

Internal attributes that support success and competitive advantage

**Opportunities**

External factors for growth and performance improvement

**Weaknesses**

Internal factors hindering performance that need improvement

# Strategy Formulation

## Frameworks for Strategy Formulation

### Example of SWOT Analysis

Let's consider a hypothetical coffee shop, "Brewed Awakenings," to illustrate how SWOT analysis can be applied.

**SWOT Analysis of a Coffee Shop**



**Expanding menu options**

Adding diverse food choices to attract more customers.

**Leveraging social media for marketing**

Utilizing social media to enhance marketing reach and engagement.

**High-quality coffee beans**

Superior beans ensure customer satisfaction and loyalty.

**Limited marketing budget**

Insufficient funds hinder effective customer outreach.

# Strategy Formulation

## Frameworks for Strategy Formulation

### Understanding the TOWS Matrix

The TOWS Matrix is a strategic management tool that helps organizations analyze their internal strengths and weaknesses in relation to external opportunities and threats.

It is structured as a 2x2 matrix, where each quadrant represents a different strategic approach:

**SWOT Strategy Matrix**

Opportunities

**WO Strategy**
Leverages opportunities to mitigate weaknesses.

**SO Strategy**
Utilizes strengths to capitalize on opportunities.

Weaknesses

Strengths

**WT Strategy**
Minimizes weaknesses to avoid threats.

**ST Strategy**
Employs strengths to counteract threats.

Threats

# Strategy Formulation

## Frameworks for Strategy Formulation

### Example of a TOWS Matrix

ShopEasy example illustrates how Indian companies can effectively utilize the TOWS Matrix to navigate challenges and seize opportunities in the rapidly evolving e-commerce landscape.

**TOWS Matrix Analysis for ShopEasy**

**Strengths-Opportunities**
- Brand Recognition
- Robust Logistics

**Strengths-Threats**
- Diverse Product Range
- Enhanced Logistics

ShopEasy

**Weaknesses-Threats**
- Cost-Control Measures
- Technology Investment

**Weaknesses-Opportunities**
- Customer Service Training
- Local Partnerships

This example illustrates how Indian companies can effectively utilize the TOWS Matrix to navigate challenges and seize opportunities in the rapidly evolving e-commerce landscape.

# Strategy Formulation

## Frameworks for Strategy Formulation

### PESTEL Analysis: A Detailed Overview

PESTEL analysis is a strategic framework used to evaluate the external factors that can impact an organization. It stands for Political, Economic, Social, Technological, Environmental, and Legal factors.



**External Factors Impacting Business**
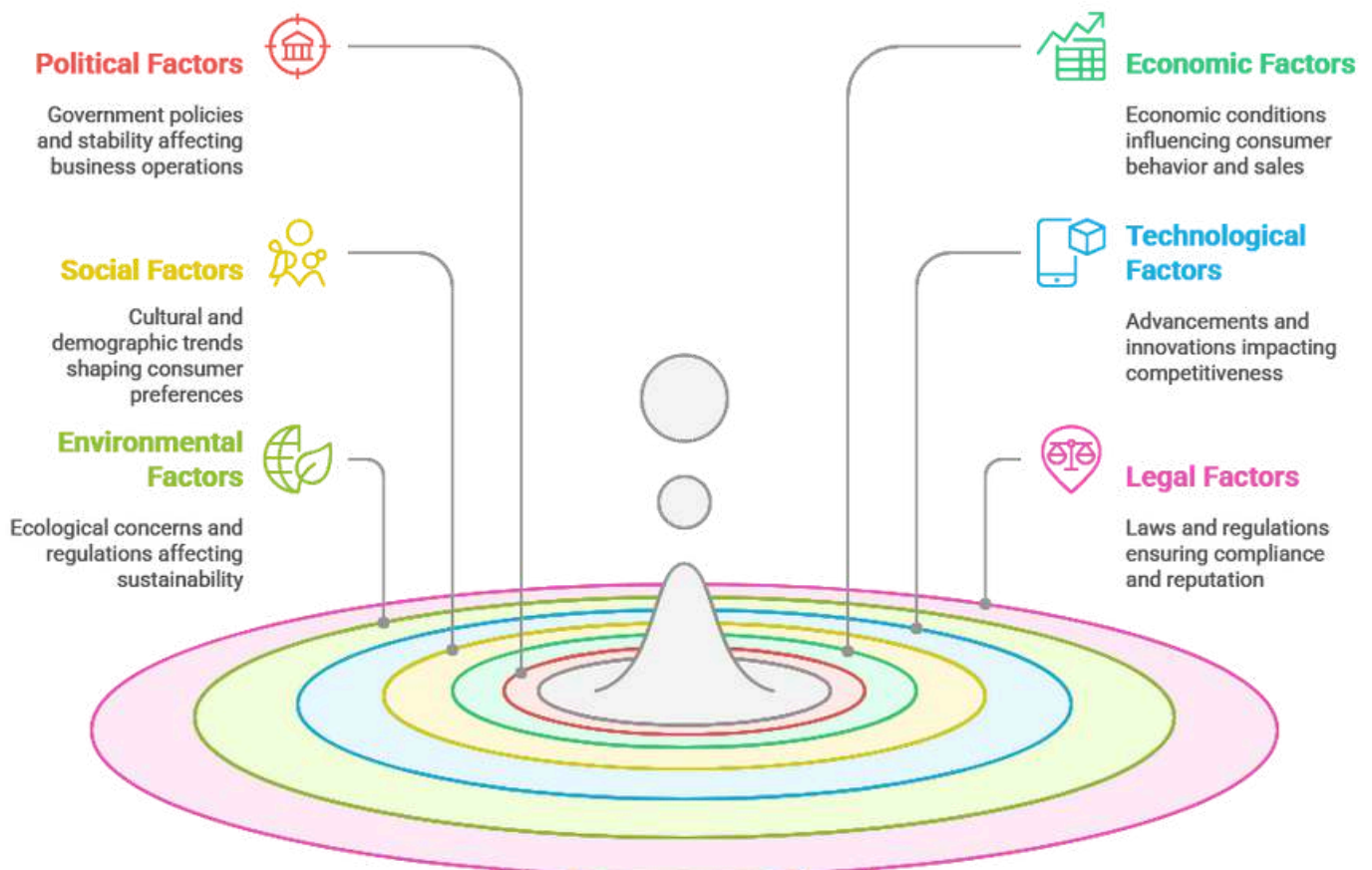
**Political Factors**
Government policies and stability affecting business operations

**Social Factors**
Cultural and demographic trends shaping consumer preferences

**Environmental Factors**
Ecological concerns and regulations affecting sustainability

**Economic Factors**
Economic conditions influencing consumer behavior and sales

**Technological Factors**
Advancements and innovations impacting competitiveness

**Legal Factors**
Laws and regulations ensuring compliance and reputation

# Strategy Formulation

## Frameworks for Strategy Formulation

### Understanding the BCG Matrix

The BCG Matrix, also known as the Boston Consulting Group Matrix, is a strategic tool used by businesses to evaluate their product lines or business units based on their market growth and market share.

**The BCG Matrix is divided into four quadrants:**
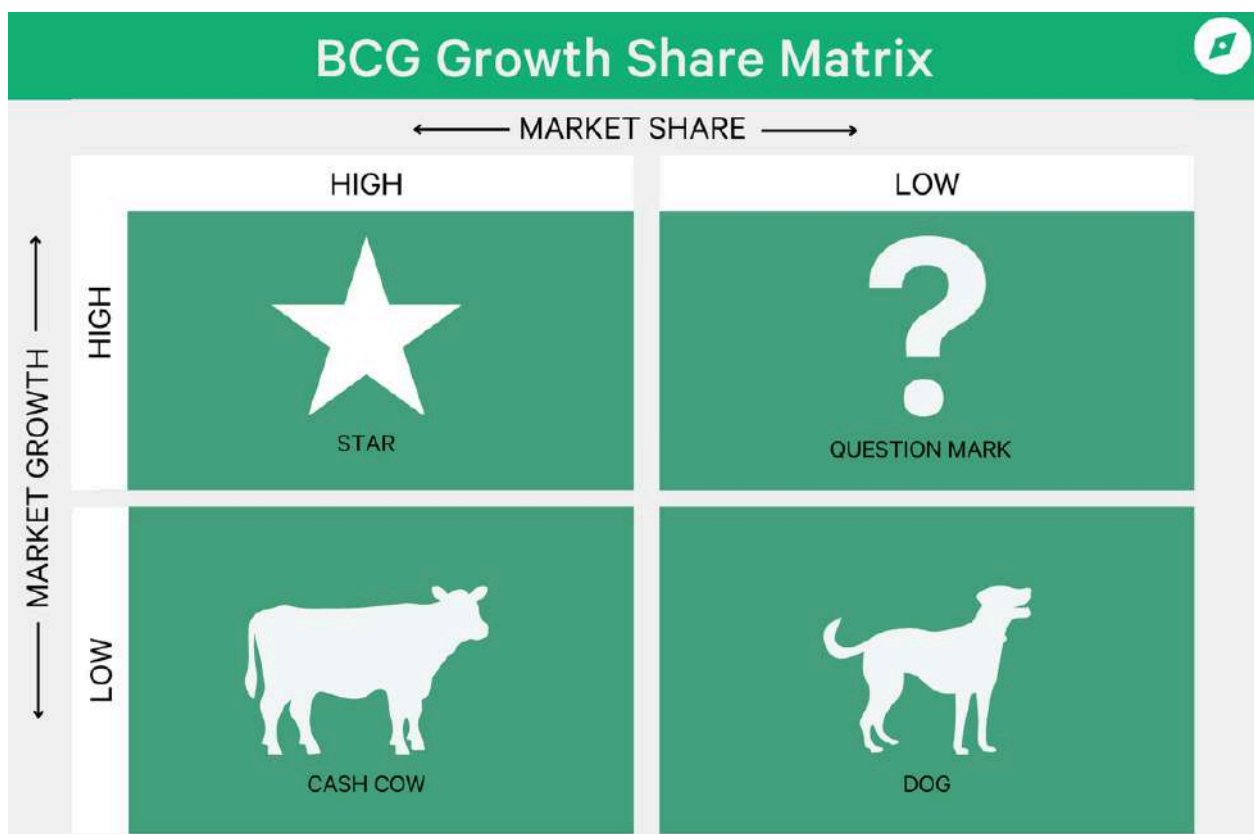
# Strategy Formulation
## Frameworks for Strategy Formulation

## Example of the BCG Matrix - Apple

- **Star (iPhone) –** Invest heavily to maintain leadership and leverage high market growth.
- **Cash Cow (iMac) –** Maintain market dominance and use profits to support other segments.
- **Question Mark (Apple Watch) –** Invest selectively to increase market share or pivot based on performance.
- **Dog (iPod) –** Divest, discontinue, or reposition the product to minimize resource drain.
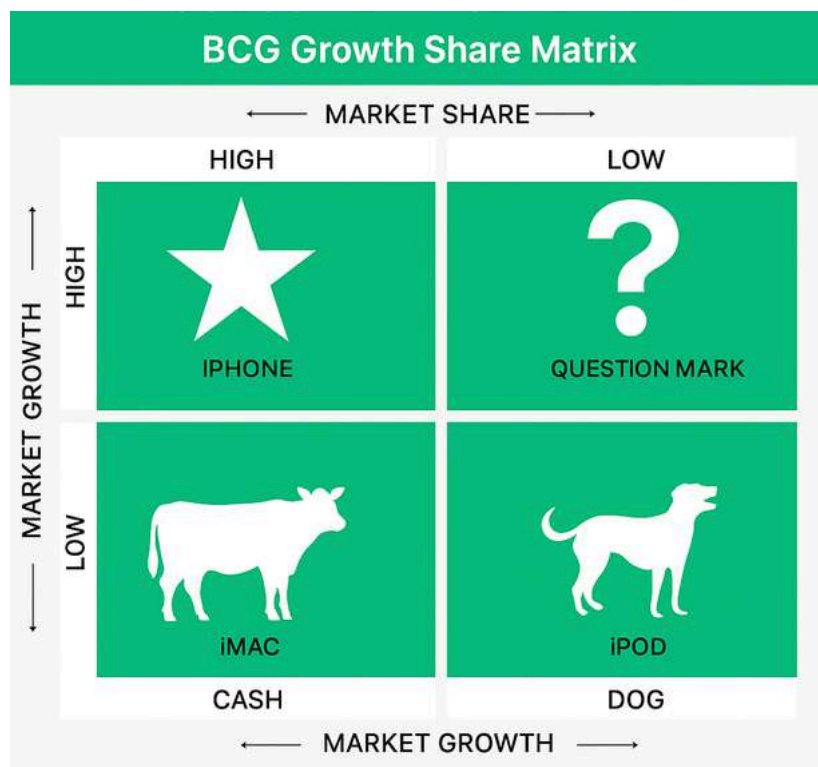


BCG Growth Share Matrix

# Strategy Formulation

## Frameworks for Strategy Formulation

### Understanding Porter's Five Forces

Porter's Five Forces is a framework for analyzing the competitive environment of an industry. It helps businesses understand the dynamics that influence their market position and profitability.
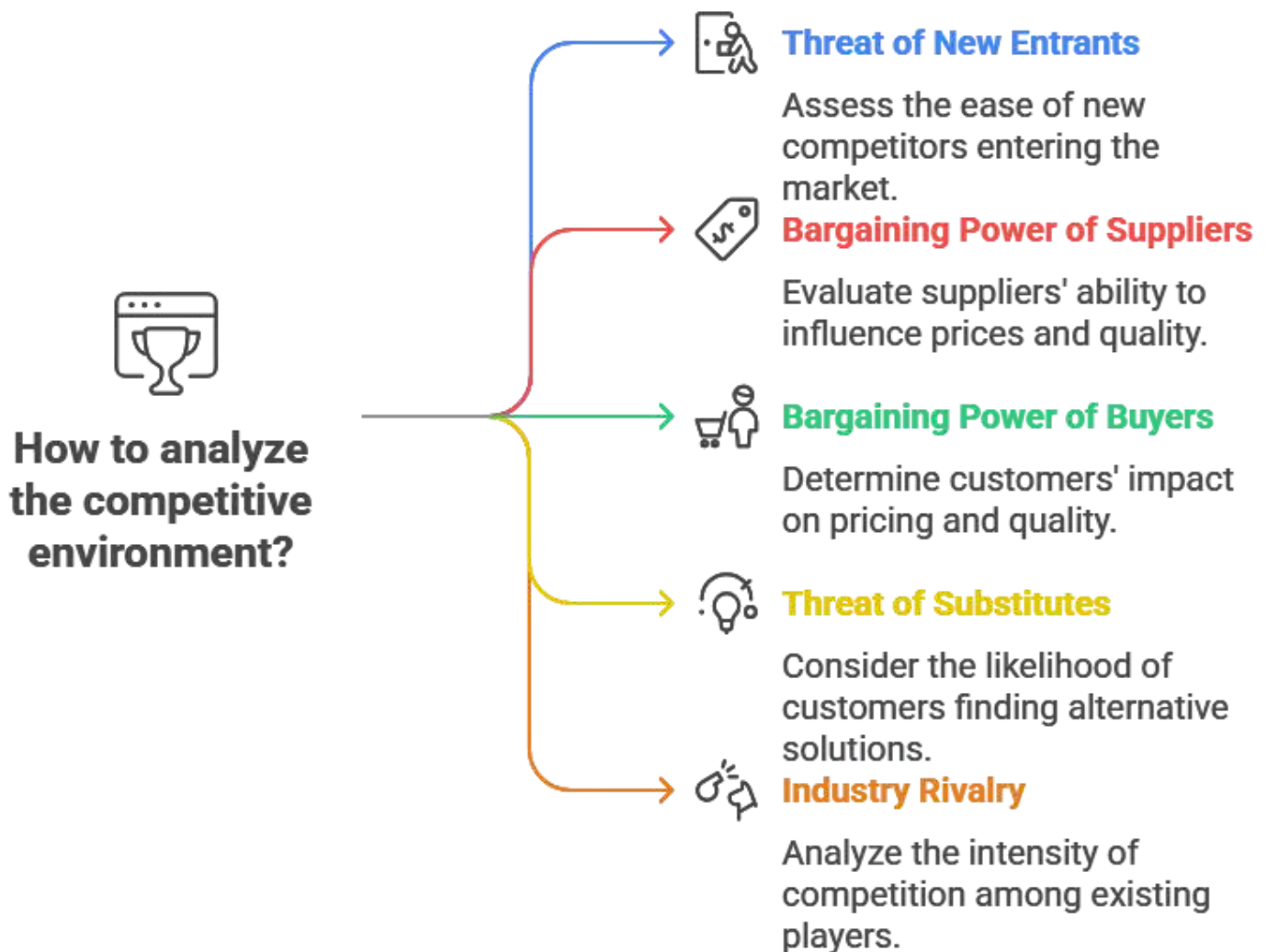
**How to analyze the competitive environment?**

**Threat of New Entrants**

Assess the ease of new competitors entering the market.

**Bargaining Power of Suppliers**

Evaluate suppliers' ability to influence prices and quality.

**Bargaining Power of Buyers**

Determine customers' impact on pricing and quality.

**Threat of Substitutes**

Consider the likelihood of customers finding alternative solutions.

**Industry Rivalry**

Analyze the intensity of competition among existing players.

# Strategy Formulation
## Frameworks for Strategy Formulation

### Porter's Five Forces Example – Smartphone Industry

Porter's Five Forces framework provides a comprehensive analysis of the competitive landscape within an industry.
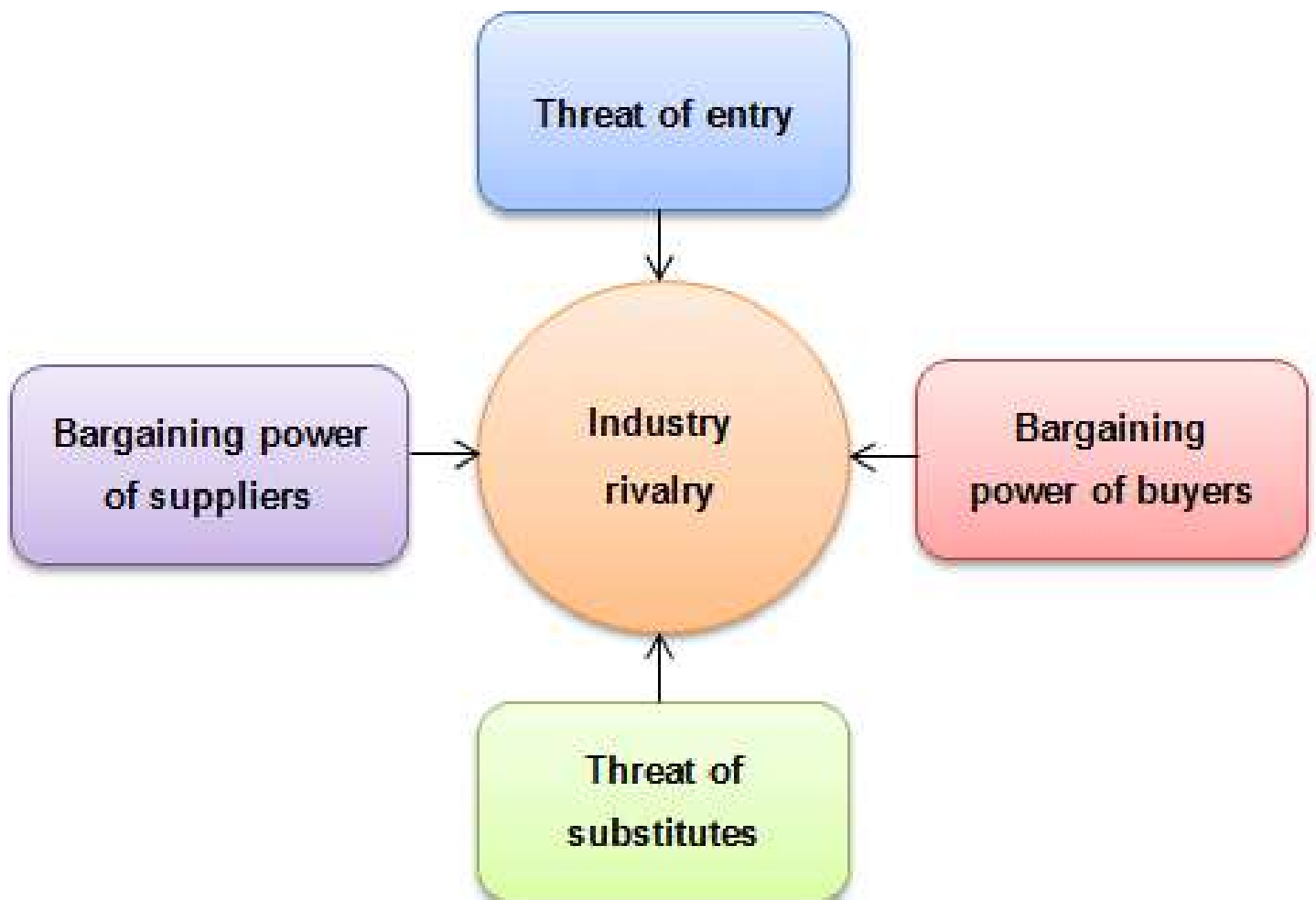
# Strategy Formulation

## Frameworks for Strategy Formulation

### Porter's Five Forces Example – Smartphone Industry

✓ **Industrial Rivalry**

Apple, Samsung, Xiaomi, and Google are all fighting for market share.

Intense competition leads to rapid innovation, aggressive marketing, and price pressure.

✓ **Threat of New Entrants**

It's hard for a new company to enter due to high R&D, brand loyalty, and distribution challenges.

Low to moderate threat — only big players like Nothing (by ex-OnePlus founder) have managed to enter recently.

# Strategy Formulation

## Frameworks for Strategy Formulation

## Porter's Five Forces Example – Smartphone Industry

✅ **Bargaining Power of Suppliers**

Chipmakers like TSMC or Qualcomm supply key components.

High supplier power, especially when few companies control critical parts like processors or OLED screens.

✅ **Bargaining Power of Buyers**

Consumers can easily compare models online and switch brands.

High buyer power due to product similarity and easy access to alternatives.

# Strategy Formulation

## Frameworks for Strategy Formulation

### Porter's Five Forces Example – Smartphone Industry

✅ **Threat of Substitutes**

Smartwatches or tablets can partially replace some phone functions.

Moderate threat, though no perfect substitute for all smartphone functions yet.

# Strategy Formulation

## Frameworks for Strategy Formulation

### Understanding 7S Framework

The 7S Framework is a management model developed by McKinsey & Company used to analyze and align the internal elements of an organization to achieve strategic goals.
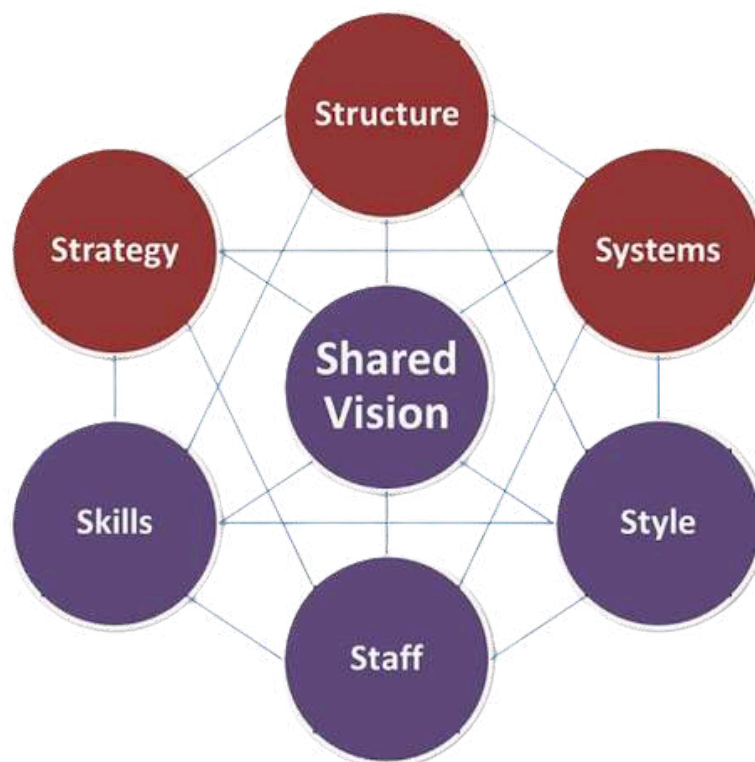


It emphasizes that seven interdependent elements must be aligned and mutually reinforced for an organization to perform well.

# Strategy Formulation

## Frameworks for Strategy Formulation

### The 7 Elements of the 7S Framework

These are divided into two categories:

**Hard Elements (Easier to identify and manage)**

✓ Strategy

✓ Structure

✓ Systems

**Soft Elements (Harder to define & influenced by culture)**

✓ Shared Vision

✓ Style

✓ Staff

✓ Skills
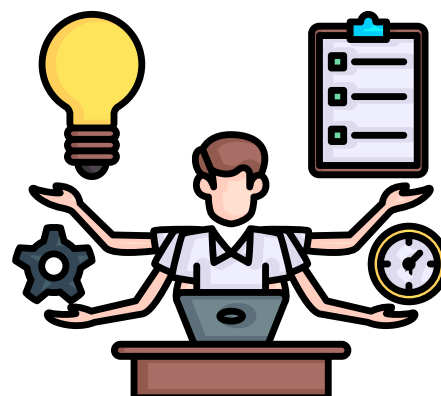
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# Strategy Formulation

## Frameworks for Strategy Formulation

### Strategy

This refers to the plan devised to maintain and build a competitive advantage over the competition.

**Example:** Apple focuses on innovation, premium branding, user-friendly design, and a seamless ecosystem (iOS, iCloud, hardware/software integration).

### Structure

This is the way the organization is structured—its hierarchy, divisions, and reporting lines.

**Example:** Apple uses a functional organizational structure. Key functions (Design, Marketing, Operations) are centralized and controlled from the top.

# Strategy Formulation

## Frameworks for Strategy Formulation

### Systems

The day-to-day processes and procedures that staff use to get the job done.

**Example:** Apple's product development is highly structured, with clear timelines and strict secrecy.

Uses advanced inventory systems, strict quality control processes, and sophisticated software development protocols.

# Strategy Formulation
## Frameworks for Strategy Formulation

### Shared Vision

These are the core beliefs and values of the company — what the organization stands for.

**Example:** Apple's innovation, excellence in design, customer experience, and simplicity.

Shared values are deeply embedded in Apple's culture and influence product choices and marketing.

### Style

This refers to the leadership style and the way managers interact with employees.

**Example:** Under Steve Jobs, leadership was highly visionary and hands-on. Under Tim Cook, it became more collaborative and operationally focused.

# Strategy Formulation
## Frameworks for Strategy Formulation

## Staff

This is about the company's people and how they are developed and motivated.

**Example:** Apple's selective hiring process, focus on top talent.

Offers professional development, a stimulating work environment, and opportunities for innovation.

## Skills

The actual skills and competencies of the organization's employees.

**Example:** Apple's strong foundation in design, engineering, software development & marketing.

Skills in creating intuitive products and understanding customer needs are key assets.

# Strategy Formulation

## Frameworks for Strategy Formulation

### Understanding Ansoff Matrix

The Ansoff Matrix, also known as the Product/Market Expansion Grid, is a strategic tool used by businesses to plan and analyze growth strategies.

It helps companies decide their product and market growth strategy based on whether products and markets are new or existing.

# Strategy Formulation

## Frameworks for Strategy Formulation

### The Four Strategies in the Ansoff Matrix

| Strategy | Market | Product | Description |
|---|---|---|---|
| 1. Market Penetration | Existing | Existing | Increase sales of current products in current markets |
| 2. Market Development | New | Existing | Enter new markets with current products |
| 3. Product Development | Existing | New | Develop new products for existing markets |
| 4. Diversification | New | New | Enter new markets with new products (most risky) |

# Strategy Formulation

## Frameworks for Strategy Formulation

### Ansoff Matrix Example: Apple

✔ **Market Penetration (Existing Product, Existing Market)**

**Example:** Apple launching trade-in offers or student discounts to boost iPhone sales.

**Goal:** Encourage existing customers to upgrade or new customers in existing markets to buy.

**Tactics:** Promotions, loyalty programs, increasing usage.

# Strategy Formulation

## Frameworks for Strategy Formulation

### Ansoff Matrix Example: Apple

✓ **Market Development (Existing Product, New Market)**

**Example:** Apple launching retail stores in the Indian geographic region.

**Goal:** Sell current products (like iPhones and MacBooks) in untapped markets.

**Tactics:** Promotions, loyalty programs, increasing usage.

# Strategy Formulation

## Frameworks for Strategy Formulation

### Ansoff Matrix Example: Apple

✓ **Product Development (New Product, Existing Market)**

**Example:** Apple launching the Apple Vision Pro for its existing U.S. tech-savvy market.

**Goal:** Create new products for current or existing customers.

**Tactics:** Innovation, R&D investment, extending product lines.

# Strategy Formulation

## Frameworks for Strategy Formulation

### Ansoff Matrix Example: Apple

✓ **Diversification (New Product, New Market)**

**Example:** Apple entering the financial services market with the Apple Card.

**Goal:** Develop entirely new product offerings for new types of customers.

**Tactics:** Strategic partnerships (e.g., with Goldman Sachs), brand leverage.

# Strategy Formulation
## Our Deliverables

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1 | Strategy Derivation or Formulation | Helps prioritize between multiple industries or revenue sources, guiding trade-offs and strategic focus for specific timeframes. |
| 2 | Formulation Session to KOLs | Classroom-style session for client's key opinion leaders (KOLs) to convey the fundamentals of strategic thinking. |
| 3 | Alignment of Strategy | Ensures alignment among Market, Customer, Product/Service, Resources, Processes, and Profit Formula. |
| 4 | Sources of Revenue Generation & Sales Data Analytics | Deep-dive into sales trends by product, region, time period, team, dealer (B2B), application, and industry to uncover growth levers. |
| 5 | External Analysis | PESTEL Analysis / SWOT Analysis / Growth Drivers & De Growth Drivers / Industry CAGR / Competitor Analysis |
| 6 | Internal Analysis | 1) Company SWOT Analysis & 2) Company Resource-Based View 3) What organization can and cant do? (Risk Appetite) |

# Strategy Formulation
## Our Deliverables

| S.No | Deliverable | Description |
|---|---|---|
| 7 | Target Setting by Product/Geography | Goal-setting based on revenue sources, product range, and target geographies to define realistic and growth-oriented objectives. |
| 8 | Integrated Resources Planning | Strategic planning for talent and resource lifecycle – attraction, acquisition, allocation, management, and retention. |
| 9 | Balanced Scorecard Strategy Statement | Strategy articulation using the Balanced Scorecard method focusing on: Financials, Internal Processes, Customer, and Learning & Growth. |
| 10 | Strategy Theme Creation | Identification of central themes to guide and unify organizational efforts across departments and SBUs. |
| 11 | Departmental Goal Alignment with SBU Strategy | Linking departmental KPIs and projects with broader strategic business unit objectives. |
| 12 | Mid-Strategy Reviews | Conducting quarterly review to measure progress, flag deviations, and adjust implementation plans. |

# Organisation Structure

## Clear Hierarchies Aligned Teams

## Types of Organisational Structures

Organisational structure refers to the way in which the activities of an organisation, such as task allocation, coordination, and supervision, are directed toward the achievement of its goals.

**Organisational Structures**

**Flat Structure**
Collaborative and quick decision-making

**Network Structure**
Agile and responsive to market changes

**Hierarchical Structure**
Traditional chain of command

**Divisional Structure**
Independent divisions with own objectives

**Matrix Structure**
Combines functional and project-based roles
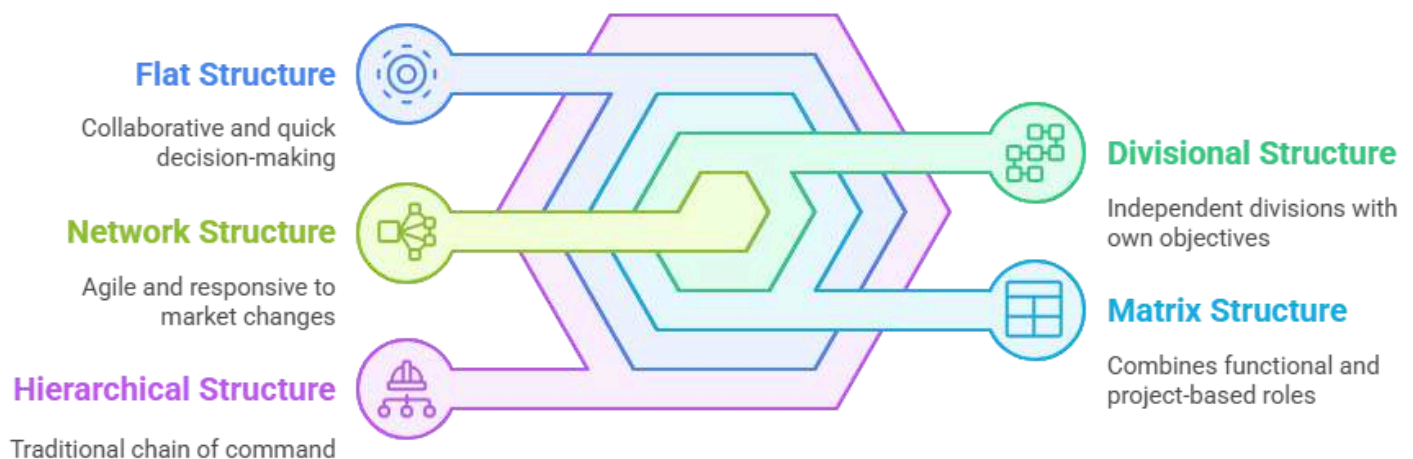
## Importance of Organisational Structure

**Clarity and Efficiency:** A well-defined structure helps clarify roles and responsibilities, leading to improved efficiency and productivity.

**Scalability:** As organisations grow, having a defined structure allows for easier scaling and adaptation to new challenges.

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# Organisation Structure

## Clear Hierarchies Aligned Teams

### Example of Organizational Structure

Apple Inc. employs a functional organizational structure, which is characterized by grouping employees based on their specific skills and expertise.

**Apple's Organizational Hierarchy**

**Executive Leadership**

Sets strategic direction and decisions

**Functional Departments**

Manage product design, marketing, and sales

**Regional Divisions**

Adapt strategies to local markets

By focusing on specialization and maintaining a clear hierarchy, Apple continues to thrive and adapt in the ever-evolving technology landscape.

# Organisation Structure
## Our Services

To design efficient hierarchies and workflows that enhance clarity, accountability, and business performance. Services we offer includes -

✅ Organisational Structure Factors Consideration

✅ Goals and Strategy Planning

✅ Delegation & Workforce Planning

✅ Value Chain Analysis



✅ Change Management Planning

✅ Job Level Grading Framework Design

✅ How Business Process Operates

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# Organisation Structure
## Our Deliverables

| S.No | Deliverable | Description |
|---|---|---|
| 1 | Organization Structure | • Creating an Organization Structure<br>• Linking Organisation Structure with Strategy & Sources of revenue generation<br>• Types of Organization Structure |
| 2 | Value chain analysis | • Understanding Value Chain of the business |
| 3 | Basic Business Process | • Creating Master Business flow chart<br>• Creating a space of succession planning & career Progression Plan |
| 4 | Sub-Process | • Any transfer / exit of existing leadership<br>• Any over dependecy of individual<br>• Understanding Delegation need with the existing leadership<br>• Right Sizing Organization<br>• Making Organization structure live by providing department wise printout and pasting |

# Organisation Structure
## Our Deliverables

### Level Grading Based Structure

| S.No | Deliverable | Description |
|---|---|---|
| 5 | Level Based Grading | • Importance of Level Grading |
| 6 | Alignment | • Policies Linking Level Grading<br>• Level Grading linking with HR Documentation (JDs, Offer letter, Appointment Letters, Salary Slips, etc.) |
| 7 | Application of Level Grading | • TA DA Policy<br>• Leave Policy<br>• Bonus Policy<br>• Overtime Policy<br>• Induction Process annexure<br>• Facilities like LTA, Transport,<br>• Career Progression Planning -<br>• Payroll designing<br>• Work from Home Policy<br>• Exit Policy - Notice Period days - Recruitment DAYs - KPI<br>• Recruitment - Travel Reimbursement Policy<br>• Variable Pay salary - during the Stress time<br>• IT Access control<br>• Area Access Control<br>• Authority Distribution |

# Human Capital

## Building Culture, Capability, and Change

Human Resources is a value-driving function that aligns talent, culture, and leadership to execute workforce strategy and sustain organizational agility and performance.

### Strategic HR Focus Areas



Securing and keeping top talent

Guiding organizational transitions

Cultivating future leaders

Identifying and addressing potential risks

Enhancing satisfaction and engagement

The ultimate goal of HR strategies

Talent Attraction & Retention

Change Management

Leadership Development

Risk Mitigation

Employee Experience

High-Performance Culture
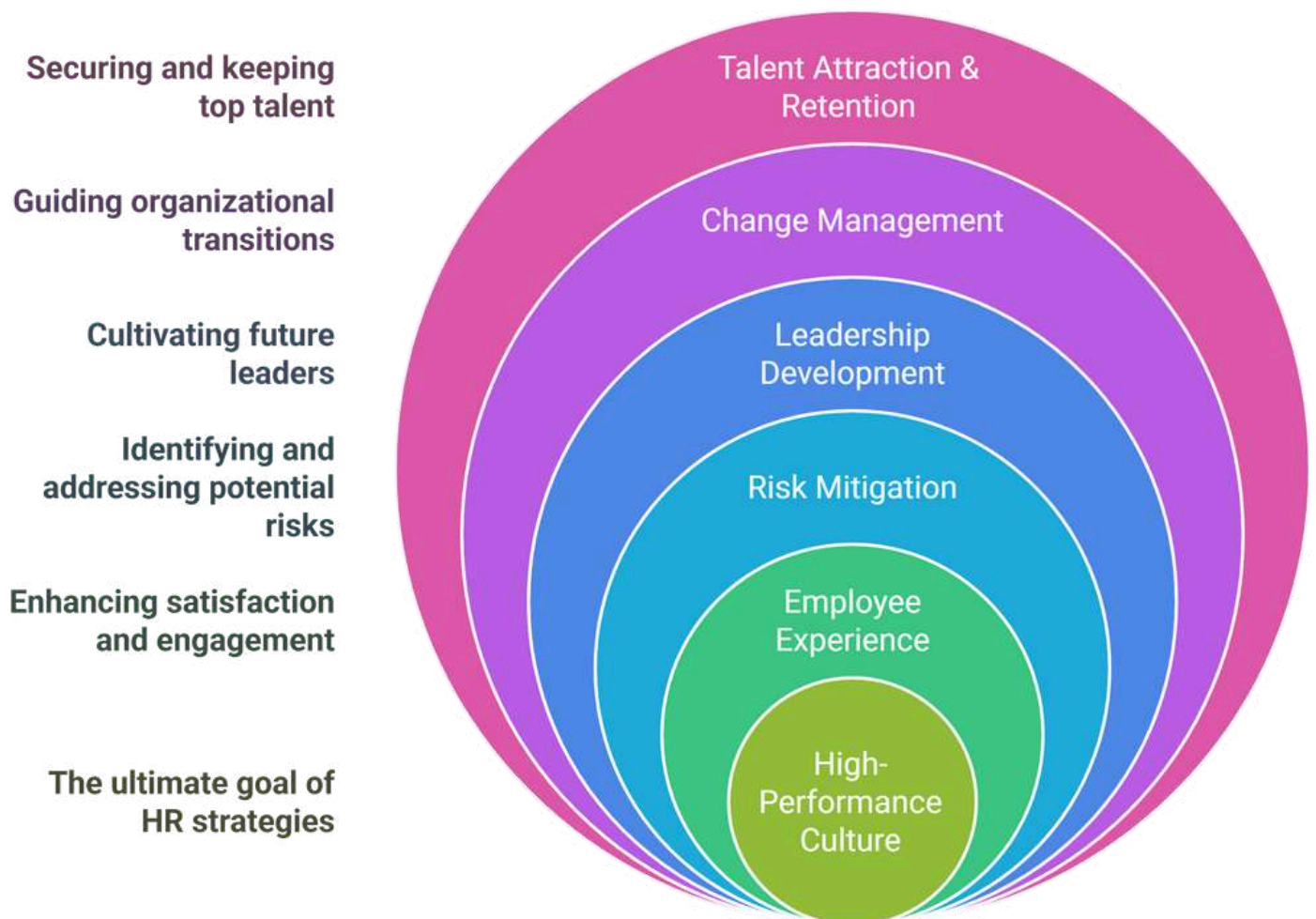
# Human Capital
## Importance of HR

✓ Aligns workforce strategy with business goals.

✓ Attracts and retains top talent.

✓ Builds a high-performance and inclusive culture.

✓ Drives learning, leadership, and capability development.

✓ Manages change, engagement, and employee experience.

✓ Ensures compliance and mitigates people-related risks.

# Human Capital
## Human Capital Management

Human Capital Management is a comprehensive approach to hiring, managing, developing, and optimizing employees to maximize their value to an organization.

It focuses on viewing employees as assets whose value can be increased through investment in training, development, and support.

## Human Capital Management

| HRM | HRD | HR Analytics |
|---|---|---|
| Recruitment & Selection | Training & Development Programs | Workforce Metrics & Dashboards |
| Induction and Onboarding | Leadership Development | Attrition & Retention Analysis |
| Payroll and Compensation | Career Progression | Hiring Trends & Efficiency |
| Award and Reward | Succession Planning | Employee Engagement Scores |
| Performance Management Systems (PMS) | Learning Management Systems (LMS) | Performance Data Analytics |
| Exit and Retention | Employee Engagement & Motivation Initiatives | Turnover to Salary Cost Analysis |
| Policy and Employee Handbook | Team Building Exercises | Others |

# Human Capital
## Example of Human Resource

## Unilever's HR Strategy

To foster a healthy, engaged, and productive workforce by integrating mental and physical well-being into the core of the company's culture.

### Unilever's Employee Well-being Strategy

- Improved Business Performance
- Holistic Wellness
- Talent Retention
- Supportive Work Environment
- Enhanced Employee Engagement
- Flexible Work Arrangements

Unilever's approach exemplifies how integrating employee well-being into HR strategy can lead to a more engaged workforce and better business outcomes.

# Human Capital
## Our Deliverable

## Recruitment & Selection

| S.No | Deliverable | Description |
|---|---|---|
| 1 | **SOP - Recruitment & Selection** | Successful Recruitment and Selection strategies reduce opportunity and hiring expenses, minimize the risk of mis-hiring, and improve staff retention.<br><br>Through guaranteeing cultural alignment and utilizing arrangements such as NDAs and NCAs, companies avoid conflicts of interest and safeguard returns of capital. Careful hiring promotes long-term expansion and business efficiency. |
| 1.1 | JA, JD & JS - Based on the organization structure, | Job Analysis, Job Description (JD) and Job Specification (JS) are done in alignment with the organization's structure to ensure each role has a clear purpose, defined responsibilities, required competencies, skill set and —supporting seamless workflow and accountability across all levels. |
| 1.2 | Recruitment Strategy | A structured approach to attract, evaluate, and hire the right talent aligned with the organization's goals and with required skill set. It includes defining hiring needs, sourcing channels, screening methods, and selection criteria to build a skilled, motivated, and culturally aligned workforce. |

# Human Capital
## Our Deliverable

## Recruitment & Selection

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1.3 | Talent Attraction Process: <br> - Employer Branding <br> - Employee Testimonial | Exhibiting the company's culture and values through Establishing employer branding and employee testimonials to attract the right talent. |
| 1.4 | Career Progression Plan | A Systematic approach that outlines growth opportunities, skill development, and role advancement within the organization—It is structured to motivate employees and align individual goals with business objectives. |
| 1.5 | Linkedin Management | Strategically handling a company's LinkedIn presence to boost brand visibility, engage the right audience to promoting service and product and attract top talent. |
| 1.6 | Ambition Box | Managing company reviews and culture insights on AmbitionBox to enhance employer branding and attract potential candidates through authentic employee experiences. |
| 1.7 | Glassdoor | Managing company reviews, ratings, and employer branding on Glassdoor to build trust, showcase workplace culture, and attract quality talent. |

# Human Resource
## Our Deliverable

## Recruitment & Selection

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1.8 | Recruitment Master | A integrated framework for managing the entire recruitment lifecycle—from workforce planning and talent sourcing to candidate evaluation and onboarding—focusing on streamlined, consistent, and efficient hiring process. |
| 1.9 | Manpower Requisition Form | A formal request form used to initiate the hiring process for roles, detailing the number of positions, job responsibilities, and required hours based on operational needs. |
| 1.10 | Calling Script | A pre-defined communication guide used during candidate outreach or follow-up calls to ensure clarity, consistency, and professionalism in recruitment conversations. |
| 1.11 | Interview Call Letter | An Interview Call Letter is a formal call sent to a candidate, informing them of the date, time, and venue of a job interview. |

# Human Resource
## Our Deliverable

## Recruitment & Selection

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1.12 | Personal Application Form | A Personal Application Form is a document used to collect an individual's personal, educational, and professional details when applying for a job or position. |
| 1.13 | Personal Application Form for sales position* | A Personal Application Form for a Senior Sales Position gathers key details about the applicant's background, experience in sales, leadership roles, achievements, and qualifications to evaluate the suitability for a senior-level sales role. |
| 1.14 | Pyschometric Test (Myers-Briggs Type Indicators) | Identifies personality types based on preferences in how people perceive the world and make decisions. It helps in understanding individual behavior, communication style, and team dynamics. |
| 1.15 | Interview Evaluation Form | An Interview Evaluation Form is used to evaluate and record a candidate's performance based on key criteria such as skills, experience, communication, and suitability for the role. when organization have skill matrix, evaluation can be done based on position wise skill matrix as well |
| 1.16 | Interview Evaluation Form - Sales* | An Interview Evaluation Form – Sales is used to evaluate a sales candidate's performance based on key criteria such as communication skills, sales experience, target orientation, negotiation ability, and cultural fit. It helps in making objective hiring decisions. |

# Human Resource
## Our Deliverable

## Recruitment & Selection

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1.17 | Offer Letter | A formal invitation issued by an employer to the candidate selected after interview rounds, outlining the job role, salary, joining date, and other terms of employment. |
| 1.18 | Offer Letter - WIthdrawal | An Offer Letter Withdrawal is a formal notification made by an employer to a candidate that a previous job offer extended to him or her has been withdrawn, normally for organizational, budget, or strategic reasons. |
| 1.19 | NDA | An NDA (Non-Disclosure Agreement) is a contract under law between two or more parties that prohibits the disclosure of confidential or sensitive data to unauthorized persons or organizations. |
| 1.20 | Ref Check form | A Ref Check Form collects feedback from a candidate's past employers to verify their work history, skills, behavior, and suitability for a job. |
| 1.21 | Support in Activation of Recruitment Process | Support in Activation of Recruitment Process involves assisting with initiating hiring steps like job posting, screening, and coordinating interviews. |

# Human Resource
## Our Deliverable

## Recruitment & Selection

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1.22 | Support in Interview of key positions | Support in key position interviews ensures strategic alignment, leadership capability assessment, and cultural fit—helping make objective, high-impact hiring decisions critical to organizational success. |
| 1.23 | Portal Training | Portal training equips employees with the skills to efficiently navigate and use internal systems for tasks like attendance, leave, performance, and HR requests—ensuring smooth digital self-service and process compliance. |
| 1.24 | Support in Activation of Recruitment Process | Training to reporting managers organizational level to clerify their roles in recruitment process |
| 1.25 | Impact Metrics | • Improve on the Opportunity cost<br>• Reduce the Hiring Cost<br>• Decreases the Mis-hiring cost<br>• Increase Employee retention (as processes are followed)<br>• Can decrease the threat of Conflict of interest to the organization<br>• Hire returns on the Return on Capital (through NDA -NCA - MWP) |

# Human Resource
## Our Deliverable

Anvikshiki | Consulting
*An Integrated Strategy Consulting Firm*

## Induction & Onboarding Process

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 2 | **Induction** | A formal induction program establishes high expectations and provides critical support, allowing new staff to become valuable contributors in less time than the normal time. This technique significantly minimizes the organization's opportunity costs by speeding up the integration and performance of employees with alignment to organisation for conducting a successful induction it is great idea to have a checklist on what to do. |
| 2.1 | Joining Form | The Joining Form is the first formal document completed by a new team member during onboarding. It captures essential personal, educational, and professional details required for HR records, payroll setup, compliance, and internal communication. |
| 2.2 | Induction Plan - Gradewise Induction Plan | A structured onboarding plan customized by job level to ensure relevant training, faster integration, and early productivity. |
| 2.3 | Induction Content | A predefined set of topics and materials shared with new joiners to familiarize them with company policies, processes, roles, and tools. |

# Human Resource
## Our Deliverable

## Induction & Onboarding Process

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 2.4 | Induction Feedback Form - General HR | A form used to capture new joiners' feedback on the overall HR induction experience, helping improve onboarding quality and effectiveness. |
| 2.5 | Induction Feedback Form - Functional | A form used to gather feedback on functional or department-specific induction, ensuring role clarity and training effectiveness. |
| 2.6 | IT & Non IT Asset Handover | IT & Non IT asset handover is the transfer of company IT equipment responsibility between employees, ensuring proper tracking and accountability. |
| 2.7 | Induction Checklist | Induction Checklist is a list of tasks and activities to ensure a new employee's smooth onboarding, covering introductions, training, policy briefings, and workplace setup. |
| 2.8 | Career Progression Plan | Career Progression Plan maps an employee's growth and advancement within the organization. |
| 2.9 | Induction Clearance Test | An induction clearance test ensures a candidate has completed training and passed the exam to be eligible for deployment. |
| 2.10 | Appointment Letter | Appointment Letter is a formal document confirming a candidate's job offer, outlining role, salary, and terms of employment. |

# Human Resource
## Our Deliverable

## Training and Development

| S.No | Deliverable | Description |
|---|---|---|
| 3 | **Training & Delvelopment** | Structured training provides the frames work provides employees alignment with employee goals, evaluating employee through skill matrix to find out the areas of competency GAP. Training gaps are analysed and programs are scheduled accordingly on timely basis. Training sessions are recorded using standard forms, with participant feedback gathered to measure success. Leadership skills are nurtured through internal programs, while a Learning Management System (LMS) organizes training and evaluations. |
| 3.1 | Employee Goal Setting | Employee Goal Setting is the process of defining clear, measurable objectives for an employee to achieve, aligned with organizational priorities. |
| 3.2 | Skill Matrix | Skill Matrix is a tool that maps employees' skills against required competencies to identify strengths and gaps. |
| 3.3 | Training need analysis | Training Need Analysis identifies skill gaps and training requirements to improve employee performance and meet organizational goals. |

# Human Resource
## Our Deliverable

## Training and Development

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 3.4 | Training Delivery Form | Training Delivery Form documents the details and completion of a training session, including content, attendees, and feedback. |
| 3.5 | Training feedback form | Training Feedback Form collects participant opinions on a training session to assess effectiveness and improve future programs. |
| 3.6 | Training Effectiveness Form | Training Effectiveness Form measures the impact of training on employee performance and learning outcomes. |
| 3.7 | Particpant Feedback From | Participant Feedback Form gathers attendees' opinions and experiences to evaluate the quality and relevance of an event or session. |
| 3.8 | Training Schedule | Training Schedule outlines planned training sessions with dates, times, topics, and facilitators. |
| 3.9 | Minimum working Period | Minimum Working Period is the required duration an employee must serve in the organization |
| 3.10 | Internal Leadership Development Procedure | Internal Leadership Development Procedure outlines the steps to identify, train, and promote potential leaders within the organization. |

# Human Resource
## Our Deliverable

## Training and Development

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 3.11 | LMS Implementation | LMS Implementation is the process of setting up a Learning Management System to manage, deliver, and track employee training and development. |
| 3.12 | Examination | Examination is a formal assessment to evaluate an individual's knowledge, skills, or competency in a specific area. |

# Human Resource
## Our Deliverable
## Performance Management

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 4 | **Performance Management - SOP** | A structured Performance Management SOP aligns employee objectives with organizational goals through clear KRAs and KPIs. Clearly defines appraisal policies, to be documneted by appraisal letter helps in evaluating and assessing performance to make inform decision on promotion and succesion planning. |
| 4.1 | KRA KPI Review | KRA (Key Result Area) defines the main responsibilities and outcomes expected from an employee's role.<br>KPI (Key Performance Indicator) measures the specific performance metrics used to evaluate success in those areas. |
| 4.2 | Performance Remarks by Senior or Reporting Manager | Remarks are provided by the Senior/Reporting Manager after the KRA and KPI review. The employee's performance meets expectations, and the evaluated skills are recorded in the skill matrix for future role mapping. |
| 4.3 | Compilation of KRA & KPI (Monthly, Quartely, Semi Annualy) | KRA & KPI data is compiled periodically (monthly, quarterly, semi-annually) based on performance remarks by the Senior/Reporting Manager. The compiled data helps evaluate performance and supports informed decisions for career growth and succession planning. |

# KRA- KPI
## Introduction to KRA & KPI

## Example of KRA and KPI – Infosys Ltd.

Infosys, a global IT giant, uses a structured KRA-KPI framework to align employee performance with business goals.

For instance, Project Managers have KRAs like Project Delivery, Client Satisfaction, Team Management, and Budget Control.

For example, Project Managers are expected to complete 95% of projects on time and maintain a CSAT score above 8.5. These KPIs are monitored through internal dashboards and feedback tools.
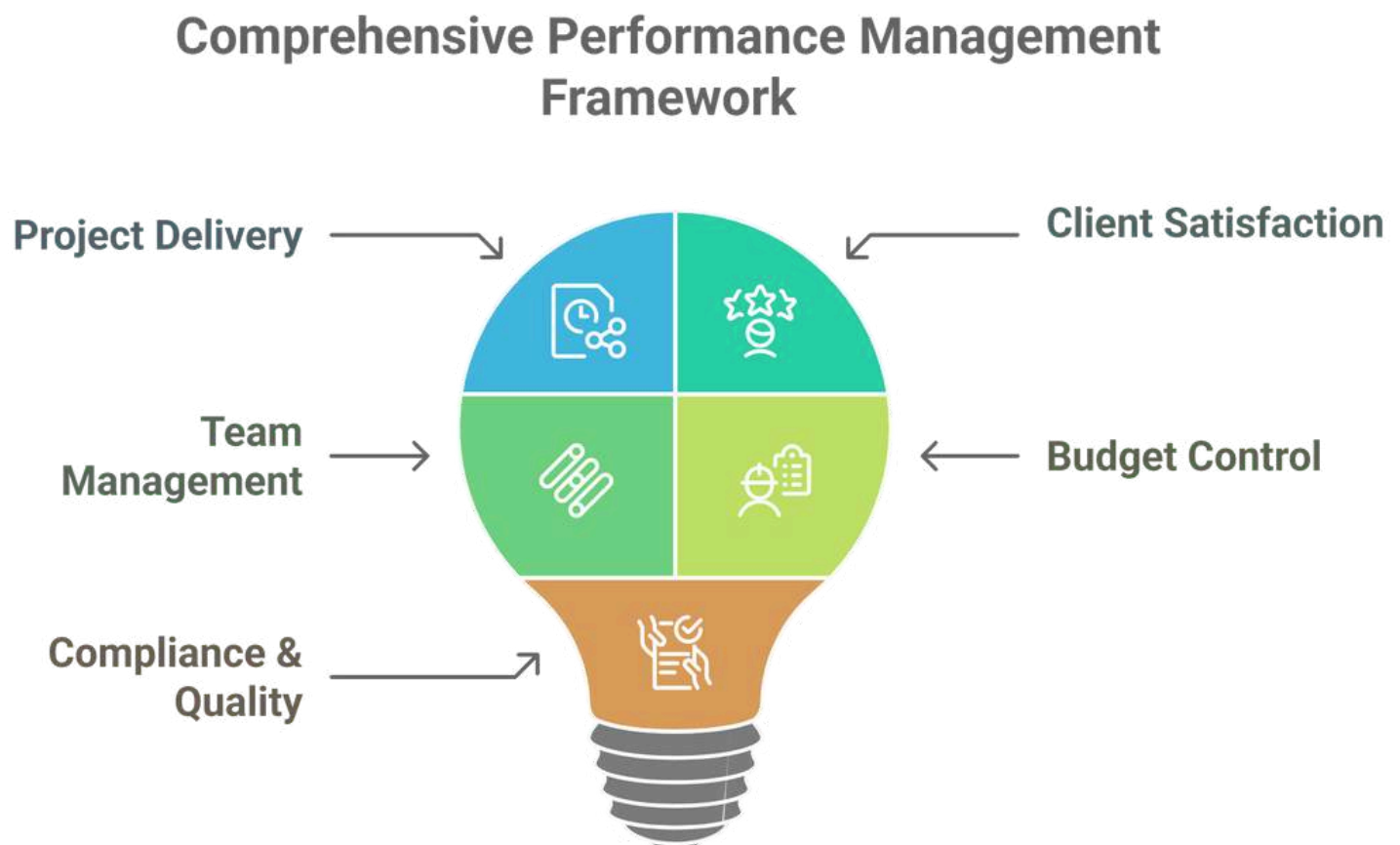


Comprehensive Performance Management Framework

Project Delivery — Client Satisfaction — Team Management — Budget Control — Compliance & Quality

# KRA– KPI
## Introduction to KRA & KPI

## What is KRA

Key Result Areas (KRAs) are the strategic focus areas of a role or department that align with the organization's overall goals.

## What is KPI

Key Performance Indicators (KPIs) are specific, measurable metrics used to evaluate an individual's or team's performance within a given KRA.

### Balancing KRAs and KPIs for Organizational Success
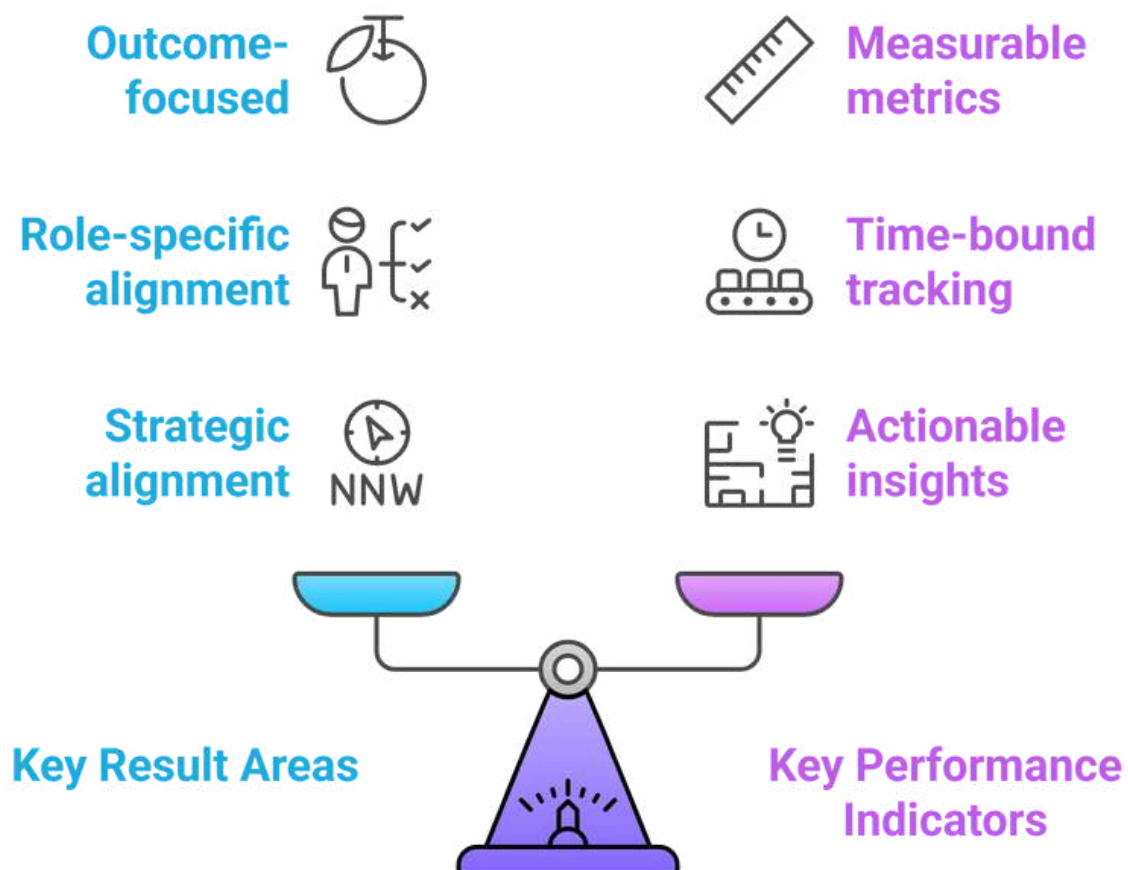
Outcome-focused

Measurable metrics

Role-specific alignment

Time-bound tracking

Strategic alignment

NNW

Actionable insights

Key Result Areas

Key Performance Indicators

# KRA– KPI
## Introduction to KRA & KPI

## Purpose of KRA

The purpose of a Key Result Area (KRA) is to define the main responsibilities and focus areas of a role that directly contribute to organizational success.

## Purpose of KPI

They provide clear, quantifiable metrics that enable performance tracking, accountability, and continuous improvement.



Effective Performance Management

Clarity    Alignment    Measurability    Accountability    Improvement

# KRA KPI
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 4.4 | **Scope of KRA KPI** | To identify if the organization needs/ have resources to implement the KRA/KPI |
| 4.5 | Pre requsite | If yes, give the KRA/KPI Presentation to the Promoter and KOLs |
| 4.6 | Creation | After the Presentation, Decide for which positions KRA/KPI needs to be prepared |
| 4.7 | Support Report generate from ERP/Software or Manual Report Preparation | Make a list of such positions along with designation, reporting person and Approved JD for all the positions and Also a Review Schedule, once the KRA is Submitted |
| 4.8 | KRA KPI Preparation | Once the list is ready, start preparation of KRA/KPIs Department Wise |
| 4.9 | Top Down Approach | Start with the Senior Position first in the department then come down to below positions |
| 4.10 | Measurement Tools/ Reports / Register | While Preparing the KRA /KPI, focus on making all the points measurable in discrete data, state the pointing structure and also add the measuring source from where the data will be measured |
| 4.11 | Approval | Get the KRA/KPI Approved from the Promoter/ Key Team Members |

# KRA KPI
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 4.12 | Linking KRA KPIs | For Senior Positions present the KRA/KPI from the Promoters Side in your presence, explain the KRA/KPI points and evaluation method |
| 4.13 | KRA/KPI Handover | For Junior Profiles, handover the KRA from the Team Leader/Reporting Manager, explain the KRA/KPI if needed |
| 4.14 | Initiate Review Process | Start Review Procedure as per Review Schedule |
| 4.15 | Review Support & Follow-up | In Each Review Session Clear Doubts of Reporting Manager and See Implementation |
| 4.16 | Improvising for next tenure | Focus on learning from current performance to enhance strategies, skills, and processes for improved results in the next cycle. |

# Human Resource
## Our Deliverable
## Performance Improvement Process

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 5 | **(PIP) Performance Improvement Process** | Anvikshiki Consulting implements the PIP process for clients to help address employee underperformance through structured goals, timelines, and support—ensuring fairness, accountability, and improved productivity. |
| 5.1 | KRA KPI | In the context of a Performance Improvement Plan (PIP), KRAs (Key Result Areas) define the specific responsibilities or focus areas where performance needs improvement. KPIs (Key Performance Indicators) are the measurable metrics used to track progress in those areas during the PIP period. |
| 5.2 | Performance Gap Issue | Employee's performance is consistently below expectations after KRA and KPI review. Immediate attention and corrective actions are required to improve results and meet targets. |
| 5.3 | PIP letter | PIP Letter is a formal document issued to an underperforming employee, outlining performance gaps, expected improvements, support provided, and the review timeline. |
| 5.4 | Skill Matrix | Skill Matrix is a visual tool used to map employees' skills against required competencies, helping identify strengths, gaps, and training needs. |

# Human Resource
## Our Deliverable
## Performance Improvement Process

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 5.5 | **Customised Training Development** | Based on the employee's position across the four skill-will matrix categories, a tailored training and development program is created to enhance either their skills or motivation, or both as required. |
| 5.7 | Personlised Coaching / Coffee Table Meeting | Personalized coaching or coffee table meetings are conducted one-on-one to provide focused guidance and support tailored to the employee's development needs. |
| 5.8 | Variable Salary | If performance does not improve, a decision may be made either to cut the variable salary or convert a portion of the fixed salary into variable pay, linking compensation directly to future performance. |
| 5.9 | Review Performance | A final performance review is conducted before initiating the employee's exit process |
| 5.10 | Outcome of PIP | 1) Team member's Performance might have revived<br>2) Reporting Manager + HR Can take decision to extend the PIP Period<br>3) Decision on voluntary or Involuntary Exit |

# Human Resource
## Our Deliverable
## Performance Improvement Process

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 5.11 | **Impact** | If the 40% Candidates, revive their Performance it mean the Process is working, PIP is like a Patient going in ICU, not all survive<br><br>It reduces Hire-Fire Cost |

# Human Resource
## Our Deliverable

## Award Reward Process

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 6 | **Award Reward Process** | The Award & Reward process acknowledges employee achievements within the engagement budget. It includes a maintained list of awardees, specifying award types and associated gifts or certificates, boosting the motivation and appreciation among the employees. |
| 6.1 | Logic & Scope | Outlines who is eligible, what types of rewards apply, and the rules for fair and consistent recognition across the organization. |
| 6.2 | Budget – Employee Engagement: | Allocated funds to support activities, programs, and initiatives that boost employee motivation, satisfaction, and connection to the organization. |
| 6.3 | List of Award Winner with Award Type and Gift / Certificate | A documented summary showcasing employees who have been recognized for their contributions, including the type of award received and the corresponding gift or certificate. This list promotes transparency, appreciation, and motivation within the organization. |

# Human Resource
## Our Deliverable

## Award Reward Process

| S.No | Deliverable | Description |
| --- | --- | --- |
| 6.4 | **Employee Engagement** | To maintain worker engagement, nurture strong connections with the organization's mission and values. Promote timely recognition of milestones, organized feedback, and regular surveys of strengths and improvement areas, maintaining a proactive company culture. |
| 6.5 | Milestone Achievement - Anniversary Achievement Policy | A recognition framework that celebrates employee service anniversaries by awarding certificates, gifts, or tokens of appreciation at defined milestones (e.g., 1, 5, 10 years), promoting loyalty and long-term engagement. |

# Human Resource
## Our Deliverable

Anvikshiki | Consulting
*An Integrated Strategy Consulting Firm*

## Exit & Retention Process

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 7 | **Exit & Retention** | Not all resignations mean a true exit; many are part of the negotiation tool in the form of salary revision or responsibility. Exit and retention process helps organization to retain the talent, and incase of acceptance of the resignation it also prevent the organization from immediate vacuum of the team member by serving a proper notice period according to a level grading.<br><br>A formal exit process guarantees smooth transfers, reduces opportunity costs, and provide constructive feedback to organisation through exit interviews.<br><br>This approach reduces turnover costs, improves organizational learning, and helps in maintaing good relations with past employees. |
| 7.1 | Voluntary Exit Interview Form | A Voluntary Exit Interview Form is a structured tool used to gather feedback from employees who resign willingly, helping organizations identify trends, improve retention strategies, and enhance workplace practices. |
| 7.2 | Involuntary Exit Interview Form | Involuntary Exit Interview Form captures feedback from terminated employees to improve HR processes and ensure compliance. |

# Human Resource
## Our Deliverable

## Exit & Retention Process

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 7.3 | Work Handover Sheet | A document outlining tasks, responsibilities, and pending work handed over by the exiting employee to ensure a smooth transition and continuity of operations. |
| 7.4 | Asset Collection Checklist | Asset Collection Checklist is a list used to track and ensure all company property (like laptops, ID cards, keys) are returned by an employee when they exit. |
| 7.5 | Damage Or Loss Deduction Register | Damage or Loss Deduction Register is a record maintained to track any financial deductions from employees' salaries due to damage or loss of company property. |
| 7.6 | Full & Final Settlement | Full & Final Settlement is the final payment made to an employee upon exit, clearing all dues. |
| 7.7 | Experience Cum Relieving Letter | Experience Cum Relieving Letter confirms an employee's work period and that they have officially left the company. |

# Human Resource
## Our Deliverable

## Payroll SOP Creation

| S.No | Deliverable | Description |
| --- | --- | --- |
| 8 | **Payroll SOP Creation** | A Payroll Standard Operating Procedure (SOP) outlines the structured steps for processing employee compensation, ensuring accuracy and compliance with legal requirements. |

## Steps of Effective Payroll SOP

**Reporting**
Generate reports for management review.

**Record Keeping**
Maintain accurate payroll records for compliance.

**Disbursement**
Process payments to employees on time.

**Review and Approval**
Ensure accuracy by reviewing calculations.

**Payroll Calculation**
Calculate gross pay, deductions, and net pay.

**Data Entry**
Input collected data into the payroll system.

**Data Collection**
Gather employee information for payroll processing.

# Human Resource
## Our Deliverable

## HR Analytics

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 9 | **HR Analytics** | HR Analytics is the term for Evaluation and assessment of HR process through data driven insights and decision making which includes analyzing key metrics like employee performance, turnover, engagement, and recruitment efficiency to make informed decisions. And evaluation of current strategyies to find GAP and scope of improvement. |
| 9.1 | Key Metrics Defining | The process of identifying relevant metrics such as headcount, attrition rate, absenteeism, average tenure, and diversity ratio—that help analyze workforce trends, support strategic planning, and enhance data-driven HR decisions. |
| 9.2 | Evaluation and Improvement Strategies | The use of HR analytics to assess the impact and efficiency of HR initiatives by Evaluating and analyzing key metrics, identifying trends or gaps, and developing data-driven strategies for continuous improvement in workforce planning, performance, and engagement. |

## HR Analytics

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 9.3 | Employee Feedback & Survey<br><br>-Peer to Peer Feedback | A structured approach to gather employee opinions, experiences, and suggestions through surveys and feedback tools, aimed at improving workplace culture, policies, and overall employee satisfaction.<br> A collaborative feedback system where employees share constructive input and recognition with colleagues, promoting a culture of trust, continuous improvement, and team engagement. |
| 9.4 | HR Budget | HR Budget is a financial planning tool we structure to help clients allocate resources efficiently across recruitment, training, compensation, and HR operations—ensuring alignment with business goals and workforce strategy. |
| 9.5 | HR MIS | HR MIS is a strategic tool we implement to help clients centralize HR data, enable real-time reporting, and drive data-backed decisions across hiring, payroll, performance, and compliance. |

# Human Resource
## Our Deliverable

## Digitalisation

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 9.6 | **Digitalisation Advisory and Implementation** | Here, there can be following probability, either the company already has finalised an ERP Vendor that Include HCM Module, or the Company can opt standalone SaaS Platforms like Keka, FactoHR, Spine HR, Etc.<br><br>For the Customised ERP Development SRS Module has to be developed but for SaaS platform, we only have to choose a suitable plan.<br><br>However, there can be a possibility of a hybrid scenario case to case basis.<br><br>We strongly advise client to digitise their HR Functions in any mode |
| 9.7 | Vendor Sourcing | The process of identifying, evaluating, and selecting external vendors to provide goods or services that support HR operations and organizational needs. |
| 9.8 | SRS Creation (Software Requirements Specification) | The process of documenting detailed functional and non-functional requirements for a software system, serving as a blueprint for development and ensuring alignment between stakeholders and technical teams. |

# Human Resource
## Our Deliverable

## Digitalisation

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 9.9 | Implementation Review | An evaluation conducted after a project or system rollout to assess its effectiveness, identify issues, and ensure objectives and requirements have been met. |
| 9.10 | Go live | The official launch of a new system, process, or project, marking the point where it becomes fully operational and accessible to end-users. |

# Human Resource
## Our Deliverable

## Key HR Functions

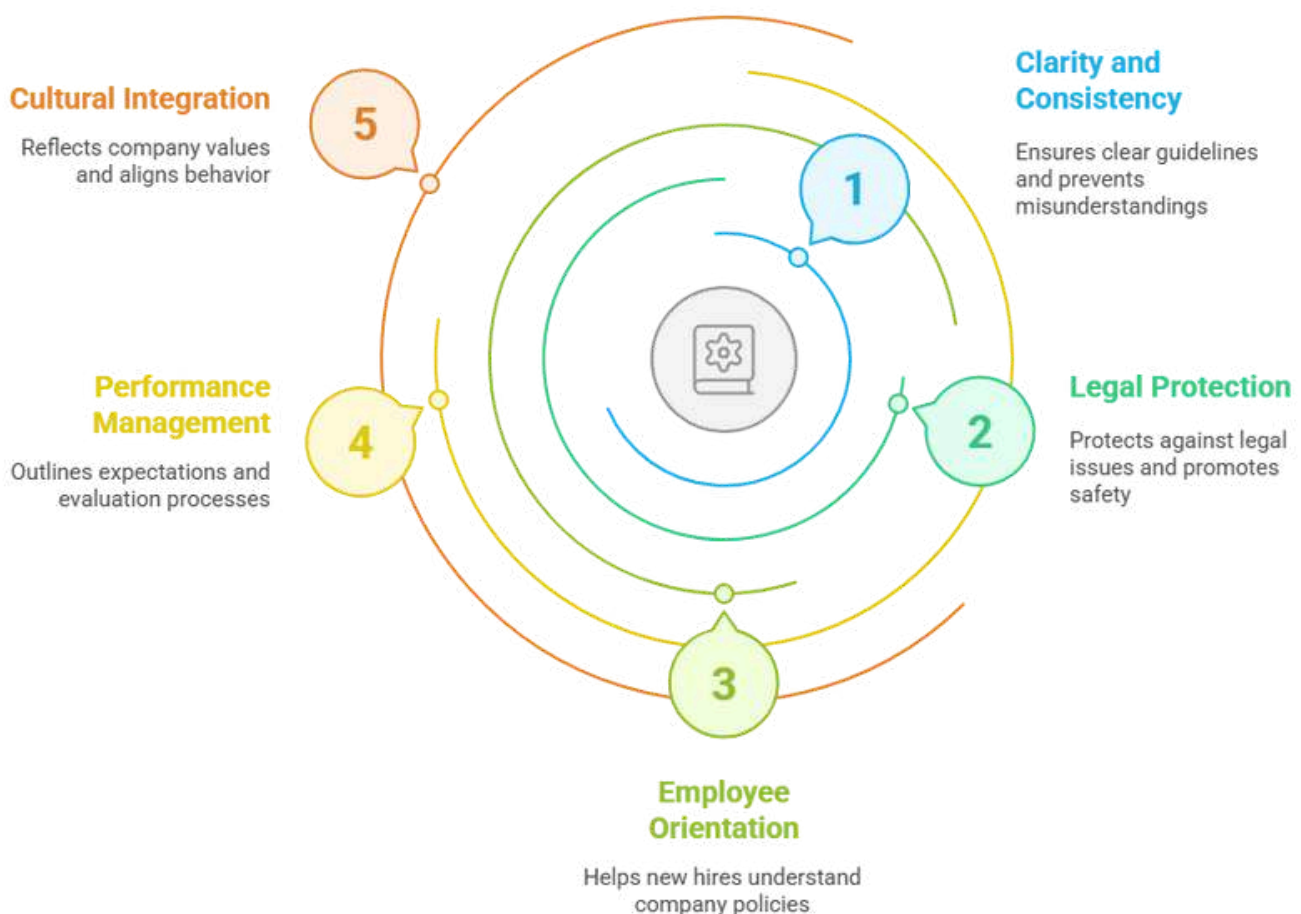| S.No | Deliverable | Description |
|------|-------------|-------------|
| 10 | **HR Integration**<br><br>Post Merger and Acquisition | HR integration post-M&A ensures smooth alignment of people, culture, and systems. It's crucial for retaining talent, maintaining operations, and realizing merger synergies. |
| 10.1 | Outplacement Services \| During layoffs and change management | Support to help laid-off employees transition smoothly through career guidance and job search assistance. |

# Employee Policy HandBook
## Your Guide to Roles & Responsibilities

An employee policy handbook is a crucial document that outlines the rules, regulations, and expectations of an organization for its employees.

It serves as a comprehensive guide that helps employees understand their rights, responsibilities, and the company's culture.

## Importance of an Employee Policy Handbook

**Benefits of a Workplace Handbook**

**Cultural Integration**
Reflects company values and aligns behavior

**Clarity and Consistency**
Ensures clear guidelines and prevents misunderstandings

**Performance Management**
Outlines expectations and evaluation processes

**Legal Protection**
Protects against legal issues and promotes safety

**Employee Orientation**
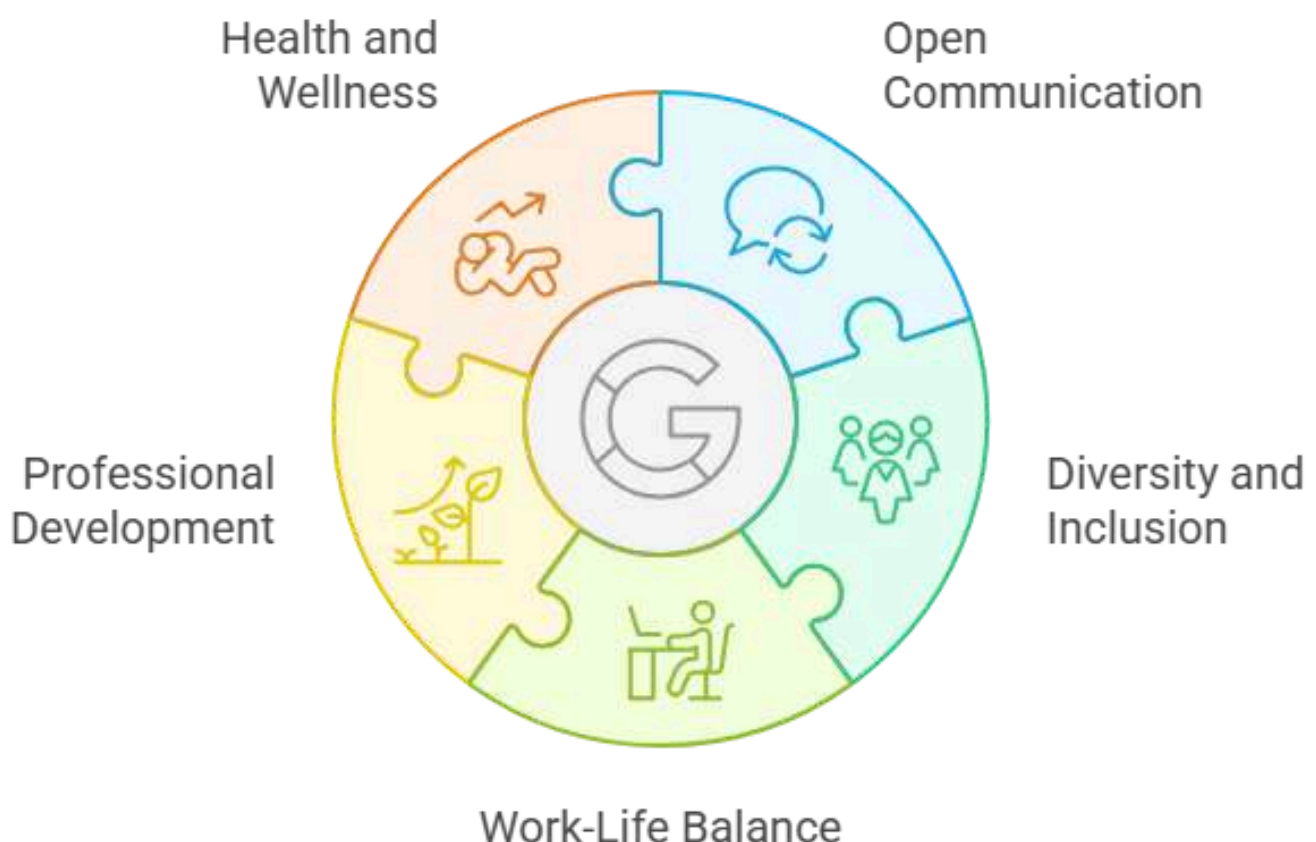Helps new hires understand company policies

# Employee Policy HandBook

## Example of an Employee Policy Handbook - Google

Google's employee policy handbook, known as "The Google Way," emphasizes the company's commitment to innovation, collaboration, and employee well-being.

### Google's Employee Handbook Overview



- Health and Wellness
- Open Communication
- Professional Development
- Diversity and Inclusion
- Work-Life Balance

# Employee Policy HandBook
## Our Deliverable

| S.No | Deliverables | Description |
|---|---|---|
| 1 | Importance of Policy | Understanding the need for a comprehensive policy. |
| 2 | Pre-requisites | Gathering necessary resources and information. |
| 3 | Policy Pillars | Establishing the foundational principles to run the policies. |
| 4 | Handbook Preparation | Creating the initial version of the handbook. |
| 5 | Final Draft Discussion | Reviewing and refining the final draft with Clients. |
| 6 | Information Compilation | Collecting and organizing all necessary information. |
| 7 | Handbook Design | Creating a visually appealing and user-friendly design. |
| 8 | Official Launch | Officially releasing the handbook to the Organization. |
| 9 | Distribution & Training | Distributing handbook & conducting interactive sessions for employee understanding. |
| 10 | Compliance | Ensuring employees acknowledge and comply with the handbook policies. |
| 11 | Digitalisation | Digitalisation - LMS of the Policy with screen recording |

# Human Resource
## Our Deliverable

## Leadership Development

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 11 | **Emerging Leadership Development** | Leadership development focuses on developing the line of leadership in an Organisation by fostering the the skill of smooth delegation of task among team members, developing the empahizes of empathy in the corporate enviornment and top line line leadership development as well as enhancement. |
| 11.1 | Delegation | Delegation is the process by which leaders assign tasks and responsibilities to team members, empowering them to make decisions and take ownership |
| 11.2 | Empathy in Corporate | Empathy means understanding others' feelings and perspectives. In corporate settings, it helps leaders connect with employees, improves communication, and fosters a supportive work culture. |
| 11.3 | Leadership Development for Senior Management | Leadership development for senior management focuses on enhancing strategic thinking, decision-making, and people management skills. It prepares leaders to drive organizational growth, lead change, and mentor future leaders. |
| 11.4 | Pyschometric Test (Myers-Briggs Type Indicators) | Identifies personality types based on preferences in how people perceive the world and make decisions. It helps in understanding individual behavior, communication style, and team dynamics. |

# Marketing
## From Awareness to Action

Marketing is the process of understanding customer needs and creating value. It connects businesses with audiences to drive engagement and growth.

**Marketing Process Pyramid**

**Distribution**
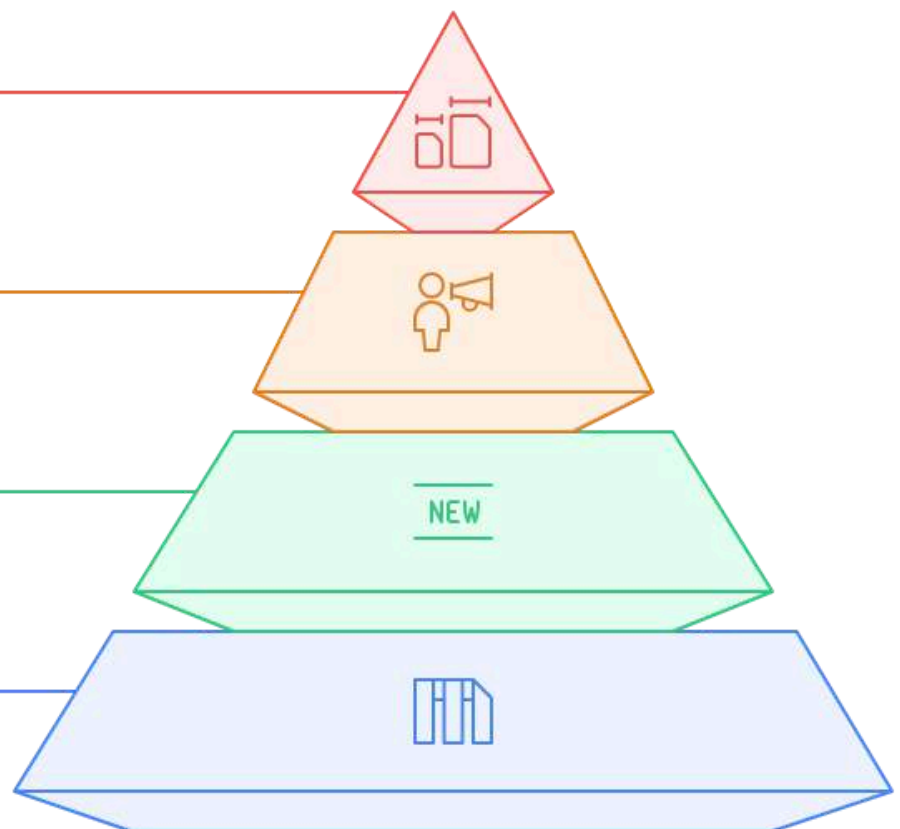
Making products available to the market

**Promotion**

Communicating product value to customers

**New Product Development**

Creating and launching new products

NEW

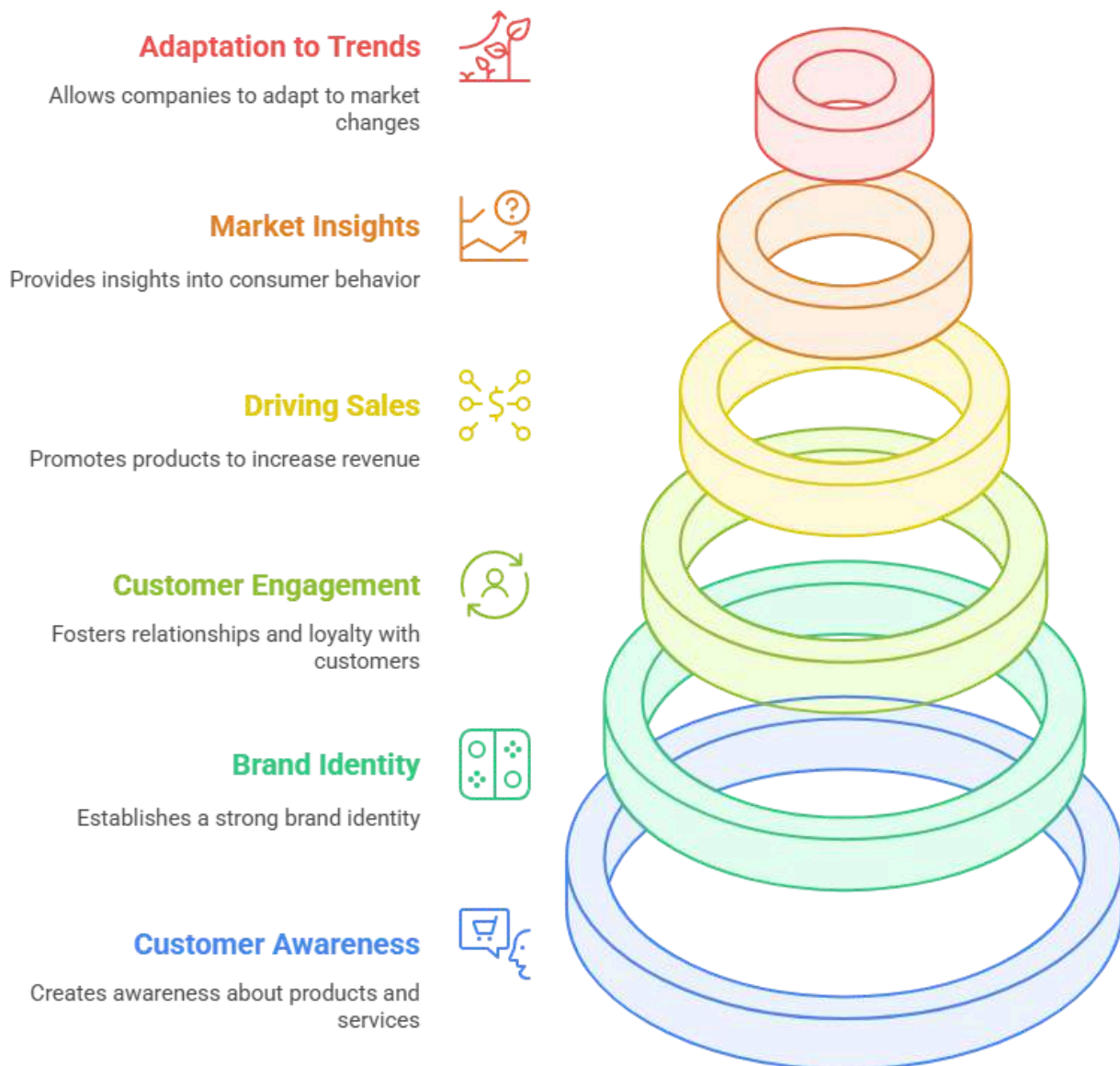**Market Research**

Gathering and analyzing market data

Marketing not only helps in promoting products and services but also plays a crucial role in understanding consumer behavior and building brand loyalty.

# Marketing
## From Awareness to Action

## Why is Marketing Important?

### Marketing Success Pyramid

**Adaptation to Trends**

Allows companies to adapt to market changes

**Market Insights**

Provides insights into consumer behavior

**Driving Sales**

Promotes products to increase revenue

**Customer Engagement**

Fosters relationships and loyalty with customers

**Brand Identity**

Establishes a strong brand identity

**Customer Awareness**

Creates awareness about products and services

Companies like Apple demonstrate the power of effective marketing in driving success and maintaining a competitive edge in the market.

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# Marketing
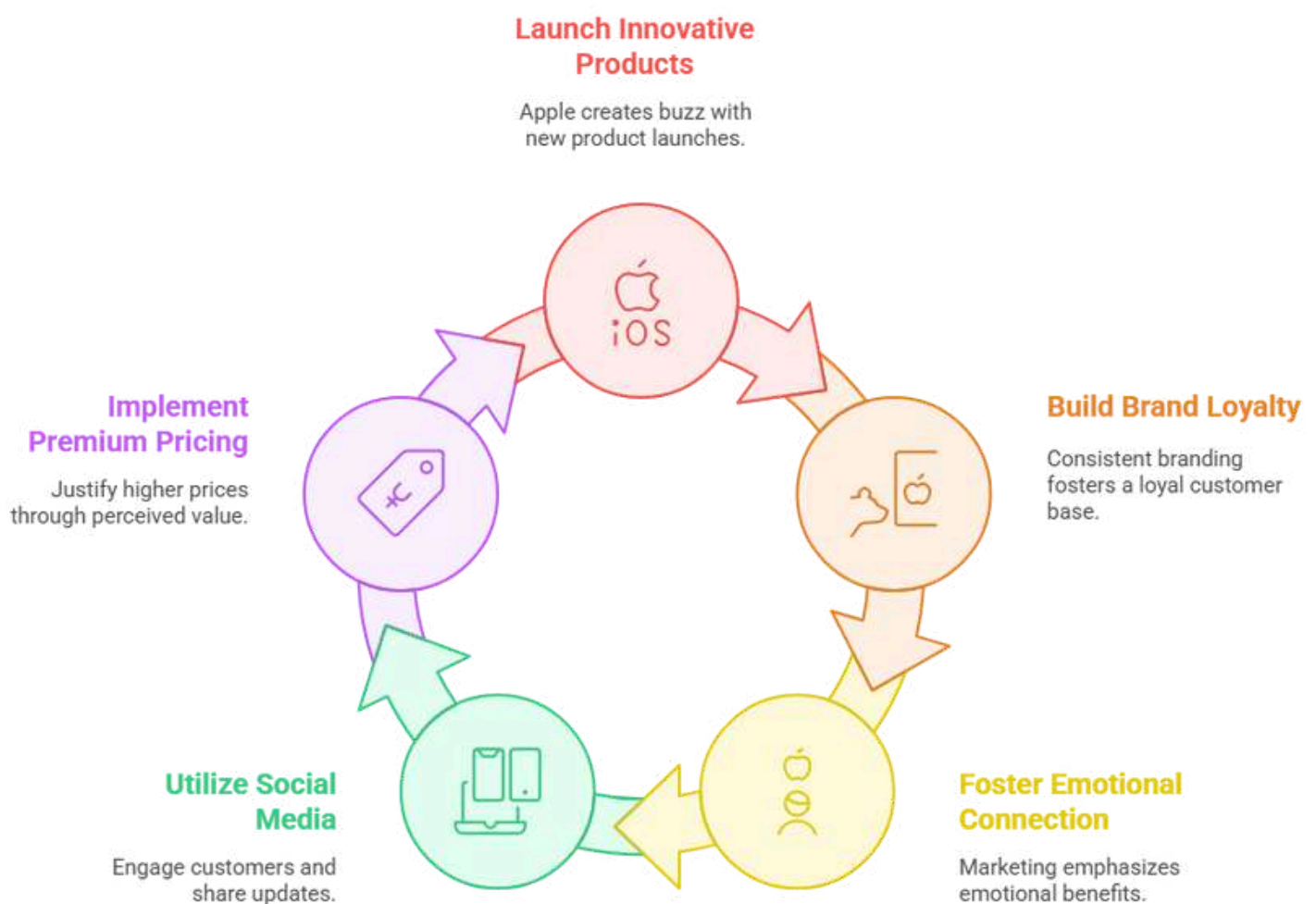## From Awareness to Action

## Understanding Marketing Example - Apple

Apple Inc. is a prime example of a company that excels in marketing. Here's how Apple effectively utilizes marketing strategies:

### Apple's Marketing Cycle

**Launch Innovative Products**

Apple creates buzz with new product launches.

**Build Brand Loyalty**

Consistent branding fosters a loyal customer base.

**Implement Premium Pricing**

Justify higher prices through perceived value.

**Foster Emotional Connection**

Marketing emphasizes emotional benefits.

**Utilize Social Media**

Engage customers and share updates.

Apple positions itself as a premium brand, using marketing to justify higher prices through perceived value and quality.

# Marketing
## Our Services

To drive brand growth and customer engagement through strategic, data-driven marketing initiatives.

✓ Marketing Audit & Benchmarking

✓ Marketing Research & Analysis

✓ Digital Presence & Performance Setup

✓ Consumer Behaviour & Pricing Strategies
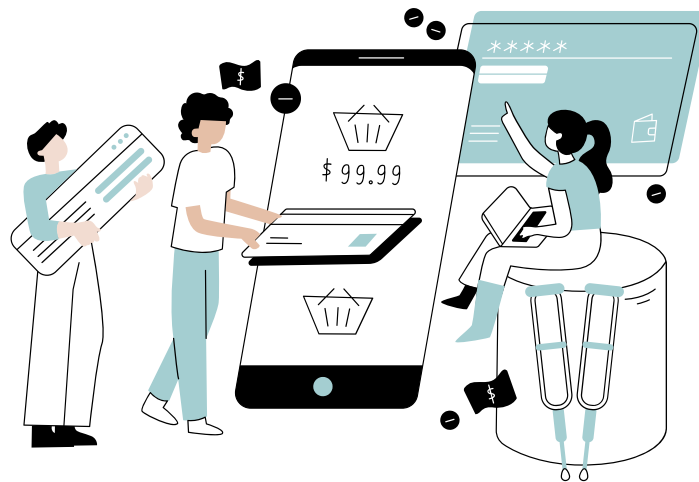
✓ Content & Campaign Strategy

✓ WhatsApp Marketing Setup

✓ Media Planning & Budgeting

✓ Social Media Marketing Audit

# Marketing
## Our Deliverable

Anvikshiki | Consulting
*An Integrated Strategy Consulting Firm*

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1 | **Marketing Strategy** | <ul><li>Identifies target customer segments and their needs.</li><li>Establishes clear value propositions and messaging.</li><li>Selects optimal marketing channels (digital, offline, partner-led, etc.).</li><li>Campaign Objective - Brand And Lead Generation</li></ul> |
| 1.1 | Marketing Research & Analysis | <ul><li>STP, 4Ps, 5C, Customer Journey Mapping, 4A's & 5C's</li></ul> |
| 1.2 | Marketing Budgeting | <ul><li>Budget distribution by channel/funnel/region, timeline, & seasonal budget planning.</li></ul> |
| 1.3 | Vendor Evaluation | <ul><li>Chosen according Industry Wise, mediating In scope formation, meeting</li></ul> |
| 1.4 | Brand Gudielines | <ul><li>Brand tagline, Colour Prospect, Voice Tone, Brand Message, Brand Theme</li></ul> |
| 1.5 | Channel Mix - ATL | <ul><li>Bill Boards</li><li>Hoarding</li><li>TV ads, Celebrity Endrosement, Radio</li><li>News Paper</li><li>Magazines</li></ul> |

# Marketing
## Our Deliverable

| S.No | Deliverable | Description |
|---|---|---|
| 1.6 | Channel Mix - BTL | • Email Marketing<br>• Sponsorships<br>• Coupons<br>• MemberShip Card<br>• InStore Promoters<br>• Tele Marketing<br>• Exibhition<br>• Networking<br>• Whatsapp API<br>• Whatsapp Blue Tick |
| 1.7 | Channel Mix - TTL | • Digital Marketing<br>• SMM<br>• SEO & Web Analytics<br>• Afflieated Marketing<br>• Influncer Marketing<br>• Instagram Blue Tick<br>• Content Marketing<br>• Website, Performance Marketing<br>• Web Site Auditing /Advisory |
| 2 | Integrated Marketing Planner | • Execution of overall market channels |
| 3 | MarTech Stack Strategy | • MarTech Goals & Use Case Mapping<br>• Tool Selection<br>• Training, Adoption & Documentation |
| 4 | Marketing process Evaluation | • KPI Creation & Measurement<br>• Feedback Loop System<br>• And Final Evaluation |

# Marketing
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 5 | Performance Analytics to Trade Offs | Analyze performance trade-offs across metrics and platforms to uncover gaps, inefficiencies, or missed opportunities. |
| 6 | E-commerce | <ul><li>Evaluate product-market fit, guide GTM planning</li><li>Store Performance & Experience Evaluation</li><li>Product Listing & Conversion Optimization</li></ul> |

# Sales
## The Frontline Force Behind Business Growth

Sales is the direct process of closing deals with customers by offering products or services that meet their needs.

It involves lead qualification, negotiation, order booking, and follow-ups. Sales is focused on actual conversion—turning opportunities into revenue.

## Why is Sales Important?

### Sales Importance Pyramid

**Insights Provider**

Offers first-hand feedback from buyers

**Planning Support**

Sales forecasts determine production volume
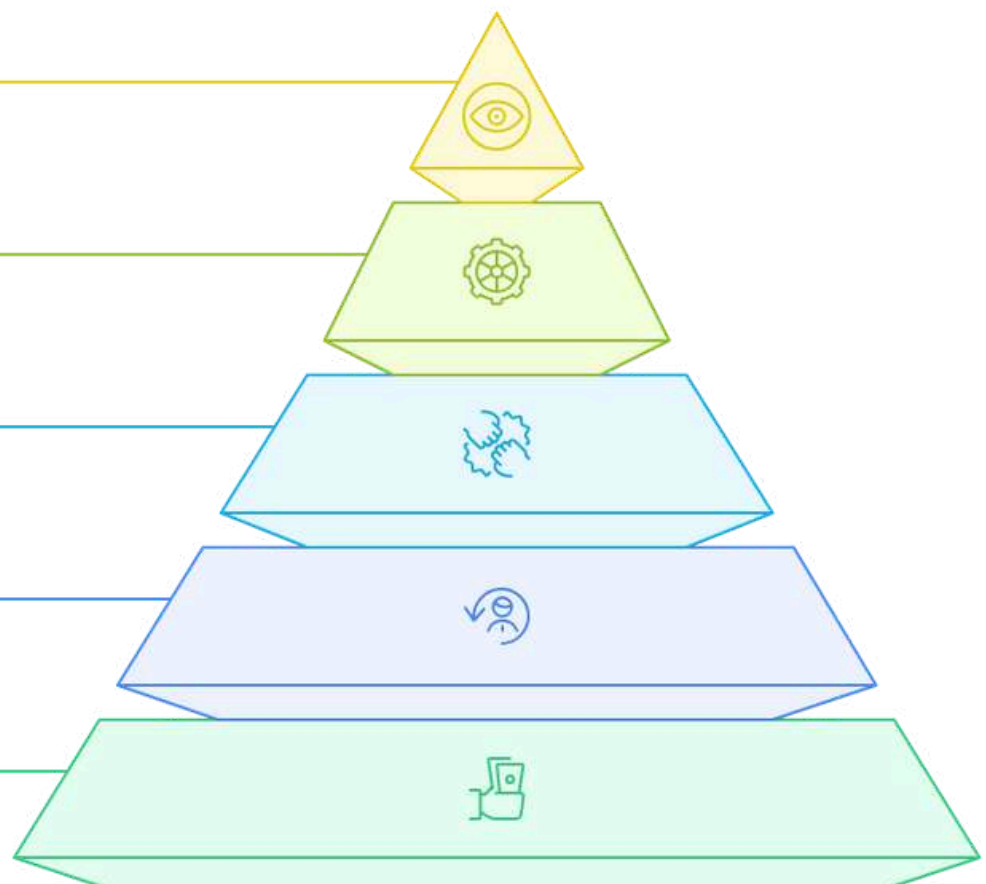
**Relationship Building**

Creates trust and long-term buyer relationships

**Lead Conversion**

Converts leads into paying customers

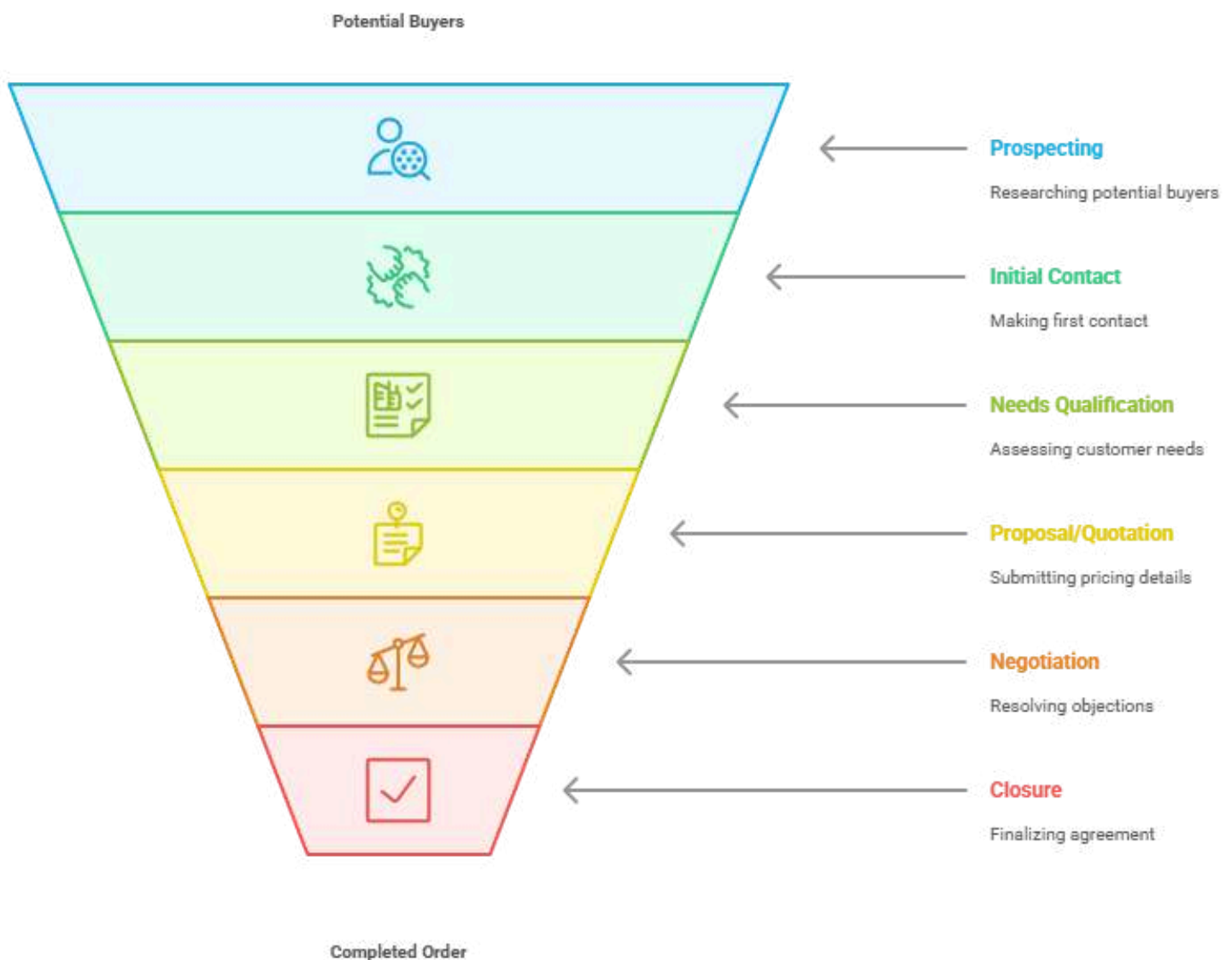**Revenue Driver**

Only function bringing money into the business

# Sales
## The Frontline Force Behind Business Growth

The sales funnel represents the step-by-step process followed by sales teams to convert leads into orders.

Potential Buyers

| Stage | Description |
|---|---|
| **Prospecting** | Researching potential buyers |
| **Initial Contact** | Making first contact |
| **Needs Qualification** | Assessing customer needs |
| **Proposal/Quotation** | Submitting pricing details |
| **Negotiation** | Resolving objections |
| **Closure** | Finalizing agreement |

Completed Order

This structure allows sales managers to track performance at each stage and optimize bottlenecks.

# Sales
## The Frontline Force Behind Business Growth

## Example – B2B Industrial Sales: Tata Steel B2B Sales Model

### Tata Steel B2B Sales Model

| Characteristic | Description |
|---|---|
| Target Clients | Auto, infra, and manufacturing |
| Account Management | Assigned account managers |
| Sales Meetings | Demand forecasting, pricing, volume |
| Proposals | Customized, industry-specific |
| Post-Sales | Repeat orders, payment follow-up |

Sales is not a one-time event but a relationship-driven, performance-linked function with recurring revenues and long-term partnerships.

# Sales
## Our Services

To enhance revenue growth through strategic planning, process optimization, and performance improvement. Services we offers includes -

✅ Sales Process Audit & Optimization

✅ Customer Profile & Persona Development

✅ Sales Analytics & Performance Tracking

✅ CRM Setup & Sales Funnel Structuring

✅ Sales Training & Enablement

✅ Sales Playbook Creation

✅ Lead Generation Strategy

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# Sales
## Our Deliverable

| S.No | Deliverable | Description |
|---|---|---|
| 1 | Sales Analytics | For any projects, to identify the business strategy and its expansion model, we need to do first as is analysis of the business, how many channels are explorerd, how many new revenues, opportunities can be created?<br><br>To design a way forward ,current sales stream can help us to dig the existing stream and also to start new stream by diversification. |
| 2 | Sources of revenue Generation | When we do sales analytics, we may get sources of current revenues, we can identify the potential in the market and can develop a strategy to expand its new revenue generations |
| 3 | Sales Process Flow | Every Stream has its own unique way of Process, we can define the sales process to ensure, how we will able to acquire a new customer? or How we will be able to generate a new sales by retaining the customer |
| 4.1 | Sales Manual - Individual | • Sales Pitch<br>• Sales Approach<br>• Career Growth Opportunties |
| 4.2 | Sales Manual - Leaders | • Sales Strategy & Governance<br>• Process & Performance Management<br>• Leadership & Team Enablement |
| 5 | Sales Team KRA KPI | Under performance sales person should be measured and highlighted |

# Sales
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 6 | Sales Target Setting | Sales Target Setting Based On -<br><br>• Analyze past sales performance<br>• Sales Process Cycle (sales-related actions to complete TAT)<br>• Understand market trends and seasonality<br>• Segment targets by product, region, or team<br>• Set SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound)<br>• Involve the sales team in the target-setting process<br>• Consider team capacity and resources<br>• Factor in upcoming promotions, launches, or campaigns<br>• Review and adjust targets periodically |
| 7 | Digitlisations Advisory | Before initiating the digitalization process, we advise our clients on the importance of CRM and ERP systems for enhancing business performance & also help clients by formulating a Software Requirement Specification (SRS) required for the project. We emphasize how these tools can:<br>• Improve data analytics<br>• Simplify report generation<br>• Provide meaningful business insights<br>• Automate traditional manual processes<br>• Enhance efficiency and process streamlining |

# Sales
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 8 | Digitalisation Demo | Vendor identification according to the business requirement & process, and get into the digitalisation through hands-on training & experience |
| 9 | Digitalisation Process | We have implemented digitalization of the entire sales process using a customized CRM/ERP system.<br><br>Based on our specific business needs, we modify and configure the system, adding or changing fields, workflows, and modules to fit our sales structure.<br><br>This enables us to:<br>• Capture real-time, accurate data<br>• Track every stage of the sales cycle<br>• Customize input fields based on team requirements<br>• Generate dynamic, data-driven reports directly from the ERP |
| 10 | Sales Resource Planning | - Team planning<br><br>- Market Planning<br><br>- Supply Chain Planning<br><br>- New Product Development |

# Sales
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 11 | Sales Channel Diversification | Strategically diversification of the Sales Channel/s, for eg, B2B platforms, Own Website, Distributors, E-Commerce (B2C), |
| 12 | Sales Review Process - Weekly, Monthly to take emergent improvement actions | For the Samarth Project, this is a very important process. In this process, we do sales reviews frequently to identify the progress, because here we are to deliver the desired sales goal targets.<br><br>• Weekly / Monthly Number Progress Observed<br><br>Here, you will be required to perform the advisory part, which will examine your problem-solving skills, out-of-the-box thinking skills, to ensure that sales numbers start getting increased month on month as per the sales revenue goals.<br><br>Here, the process of lead generation or marketing also intercepts, but before reaching the conclusion, you should be in a position to identify why the sales numbers have not shot up.<br><br>To perform this job, you should ask the concerned POC to prepare the data before your meeting, so that your meeting efficiency can be increased. |

# Sales
## Our Deliverable

| S.No | Deliverable | Description |
|---|---|---|
| 13 | Channel Partner Process Development & Dealers - Distributor wise (for B2B) | • Channel Partner Policy<br>• Nomenclature<br>• Appoint Form<br>• Appointment Process<br>• Evaluation Process<br>• Channel Partner Grading<br>• Channel Partner TOD Incentives Scheme |
| 14 | IVR | • Evaluate call workflows and suggest suitable IVR solutions to streamline customer interactions.<br><br>• Assess integration needs and recommend the right APIs to connect key platforms securely. |
| 15 | Quick Commerece | • On-boarding and Support |
| 16 | Sales Policies | • Incentive Policy<br>  a. Individual Contributor Policy<br>  b. Leadership Incentive Policy<br>• Discounting Policy<br>• Pricing Policy |

# Sales Training & Devlopment
## Build Skills. Win More Deals.

A structured approach to upskilling sales teams with the tools, techniques, and mindset needed to engage clients, manage pipelines, and close deals effectively.

## Understanding the SPANCO Framework

- Brings funnel visibility and process discipline.

- Helps assign clear stage-wise ownership.

- Enables CRM alignment and tracking

# Sales Training & Devlopment

## Understanding the SPIN Selling

- Builds questioning and listening capability.

- Shifts focus from features to customer value.

- Supports solution-based, trust-led selling.

**Need-Payoff**
Highlight solution value

**Implication**
Explore consequences

**Problem**
Find pain points

**Situation**
Understand context

# Sales Training & Devlopment
## Our Deliverable

| S. No. | Deliverable | Description |
|--------|-------------|-------------|
| 1 | Sales Capability Diagnosis | • Evaluate sales team's current skills<br>• Map against sales targets & roles<br>• Identify market-specific gaps |
| 2 | Sales Training Module Design | • Role-based modules (B2B, dealer, field sales)<br>• Pitching, negotiation, closing skills<br>• Objection handling & conversion focus |
| 3 | Product & Competition Mastery | • Feature-benefit breakdown<br>• Real-world use cases & pricing logic<br>• Competitive selling scenarios |
| 4 | Sales Process Training | • Step-by-step flow of actual sales process<br>• CRM data input, funnel tracking<br>• Qualification to closure |
| 5 | Territory & Account Handling | • Mapping leads to geography/accounts<br>• Prioritization skills<br>• Channel/customer handling structure |
| 6 | Lead Management & Conversion Skills | • Lead qualification framework (SPIN)<br>• Follow-up rigor & techniques<br>• Conversion metric training |
| 7 | Deal Closing Techniques | • Value-based selling<br>• Creating urgency<br>• Negotiation psychology & pricing flexibility handling |
| 8 | Field Coaching Playbook | • Manager-led on-the-job training<br>• Real sales call debrief formats<br>• Field checklists for daily review |

# Sales Training & Devlopment
## Our Deliverable

| S. No. | Deliverable | Description |
|---|---|---|
| 9 | Sales Review Training | • Training on self-analysis via CRM<br>• Daily/weekly review formats<br>• How to spot lagging indicators |
| 10 | Sales Training Dashboards | • Dashboard creation for learning progress<br>• Attendance, performance & post-training impact<br>• Conversion impact tracking |

# Post Sales Service
## Our Deliverables

| S. No. | Deliverable | Description |
|---|---|---|
| 1 | Post-Sales Service Strategy Design | • Service vision & goals<br>• Alignment with brand & customer journey<br>• SLA & TAT definitions |
| 2 | Customer Onboarding & Communication | • Service Kit (digital/manual)<br>• Set up contact points (toll-free, WhatsApp)<br>• Post-sales check-in & service reminder |
| 3 | Service Request Management System | • Ticketing and escalation matrix<br>• Multi-channel integration<br>• CRM linkage & ownership assignment |
| 4 | Warranty & AMC Management | • Warranty registration system<br>• AMC design & auto-renewals<br>• Parts/labor coverage tracking |
| 5 | Feedback & Grievance Redressal | • Post-service NPS/CSAT forms<br>• Complaint escalation |
| 6 | Spare Parts & Inventory Control | • Parts cataloging<br>• Reorder & forecasting mechanism<br>• Warranty vs. paid part handling |

# Post Sales Service
## Our Deliverables

| S. No. | Deliverable | Description |
|---|---|---|
| 13 | Service Videos | How-to service videos<br>Product care guides<br>Digital support integration |
| 14 | Service Setup | • Workshop setup support<br>• Technician infrastructure planning<br>• Service bay layout & tools |
| 15 | Service Policies | • Service dos and don't<br>• Customer handling guidelines<br>• Standard escalation rules |

# Post Sales Service
## Our Deliverables

| S. No. | Deliverable | Description |
|---|---|---|
| 7 | Service Team Training & SOPs | • SOPs for service tasks<br>• Customer interaction training |
| 8 | Digital Enablement | • Customer app/portal for service<br>• Technician dashboard<br>• QR code for instant info |
| 9 | KPI Framework & Reporting | • Track TAT, CSAT, fix rate<br>• Weekly/monthly reporting<br>• Technician productivity metrics |
| 10 | Monetization Opportunities | • Upsell AMC & accessories<br>• Cross-sell services<br>• Loyalty/referral programs |
| 11 | Audit & Compliance | • Mystery & internal audits<br>• Consumer rights compliance |
| 12 | Continuous Improvement & Innovation | • Service pain-point mapping<br>• Monthly review meetings<br>• Kaizen & innovation logs |

# Purchase

## From Transactional to Transformational Buying

Purchase is the structured process of acquiring goods, materials, and services from external sources to support the operational and strategic needs of the organization.

## Purpose for

To procure the right quality and quantity of materials at the best possible cost, from reliable suppliers, within the required time frame—ensuring smooth production and service delivery.

## Procurement Process Sequence



**7 Cost Optimization**
Analyzing costs and optimizing processes for efficiency.

**6 Performance Monitoring**
Monitoring supplier performance to maintain quality standards.

**5 Timely Delivery**
Ensuring that goods are delivered on time to meet deadlines.

**4 Order Creation**
Creating and following up on purchase orders to ensure accuracy.

**3 Negotiation**
Negotiating prices and terms to achieve favorable agreements.

**2 Quotation Comparison**
Requesting and comparing quotations to find the best offers.

**1 Supplier Selection**
Identifying and choosing the right suppliers for the organization.

# Purchase

## Understanding Company Example – Maruti Suzuki

Maruti Suzuki's procurement model focuses on lean inventory, vendor partnerships, and localization. The company emphasizes "Just-In-Time" (JIT) procurement with continuous supplier evaluation and a strong vendor development system to ensure high-quality, cost-effective parts delivery.

## Maruti Suzuki's Procurement Strategy

**Vendor Development System**

Enhancing supplier capabilities and quality

**Lean Inventory**

Minimizing stock levels to reduce costs

**Supplier Evaluation**

Regularly assessing supplier performance

**Vendor Partnerships**

Building strong relationships with suppliers

**Just-In-Time Procurement**

Receiving parts exactly when needed for production

**Localization**

Sourcing parts locally to support local economies

# Purchase
## Our Deliverable

| S.No | Deliverable | Description |
|---|---|---|
| 1 | Purchase Basic Flow Chart | A standardized visual map outlining the end-to-end purchase process—from requisition to payment—designed to eliminate ambiguity, ensure compliance, and improve turnaround time (TAT). |
| 2 | Purchase Policy | A formalized document defining rules, roles, budget thresholds, approval matrices, and sourcing protocols to bring clarity, control, and transparency to purchasing decisions. |
| 3 | Purchase Monitoring Sheet | A real-time tracker capturing key metrics such as PO status, delivery timelines, payment cycles, and vendor performance, enabling data-driven monitoring and proactive issue resolution. |
| 4 | Supplier Evaluation System | A structured scoring mechanism evaluating vendors on quality, delivery, compliance, pricing, and responsiveness, helping clients build a reliable supplier base and mitigate risks. |
| 5 | Negotiation Mastery | A skill-enhancement module that empowers procurement teams with structured frameworks, cost-breakdown techniques, and behavioral negotiation tactics to achieve optimal pricing and terms. |

# Purchase
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 6 | BOM to BOM | An advanced cost comparison approach mapping the client's Bill of Materials (BOM) against supplier BOM to uncover hidden margins, substitutions, and cost-saving opportunities. |
| 7 | Supplier Audit Rating | A periodic audit system that assigns ratings to suppliers based on factory visits, system checks, quality audits, and compliance reviews, aiding in strategic supplier retention or exit decisions. |
| 8 | Rate Contract – 3 Layers | A multi-tiered pricing agreement system across A, B, and C class vendors, enabling price control, volume discounts, and vendor categorization based on reliability and cost-efficiency. |
| 9 | 3-Layer Negotiation | A consultative negotiation process involving technical, commercial, and strategic angles to optimize not just price, but also value-added services, payment terms, and long-term alignment. |
| 10 | TAT (Turnaround Time) | Defined timelines for each stage in the purchase cycle—requisition, approval, sourcing, delivery—used as a KPI to benchmark and improve procurement responsiveness. |

# Purchase
## Our Deliverable

| S.No | Deliverable | Description |
|---|---|---|
| 11 | Make or Buy Analysis | A strategic decision-making tool to determine whether to manufacture in-house or outsource, based on cost, core competencies, TAT, scalability, and strategic alignment. |
| 12 | Spare – To Keep the Material at Customer's Store | A customer-centric inventory strategy where critical spares are pre-stocked at client locations to reduce downtime and improve after-sales service quality. |
| 13 | Service Level Agreement (SLA) | A legally binding agreement with suppliers specifying minimum performance criteria, delivery expectations, and penalties for non-compliance to safeguard quality and reliability. |
| 14 | IQC (Incoming Quality Control) Master Plan | A robust inspection and testing framework for incoming materials, aligned with product criticality and vendor classification, to minimize production defects and rejections. |
| 15 | Supplier / Vendor Loyalty Awards | A structured reward program recognizing high-performing and long-term vendors, promoting motivation, trust, and partnership-driven growth. |
| 16 | Sharing the Vision Communication to Suppliers and Vendors | An initiative to align supplier partners with the organization's long-term vision and values, fostering collaboration, innovation, and commitment beyond transactions. |

# Maintenance

## The Backbone of Sustainable Industrial Performance

Maintenance refers to all activities aimed at keeping equipment and assets in optimal working condition, preventing unexpected failures, and extending their useful life.

## Types of Maintenance

✓ Preventive Maintenance (scheduled servicing)

✓ Breakdown/Corrective Maintenance (repair after failure)

✓ Predictive Maintenance (condition-based via IoT)

## Why is Maintenance Important?



Compliance with Regulations

Enhances Efficiency

Improves Reliability

Prolongs Lifespan
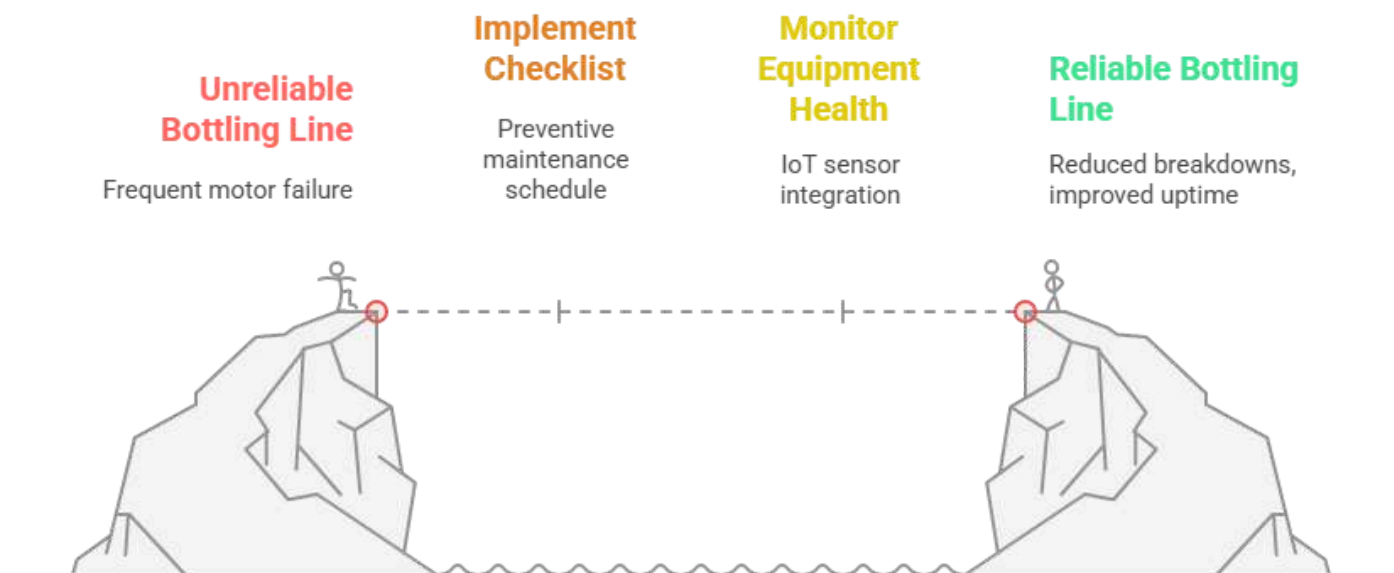
Ensures Safety

Reduces Costs

# Maintenance

## The Backbone of Sustainable Industrial Performance

## Maintance Example - Beverage Manufacturing Plant

A bottling line stopped due to motor failure. Root cause: No preventive check of lubrication levels.

### Preventing Bottling Line Downtime

**Unreliable Bottling Line**
Frequent motor failure

**Implement Checklist**
Preventive maintenance schedule

**Monitor Equipment Health**
IoT sensor integration

**Reliable Bottling Line**
Reduced breakdowns, improved uptime

Implemented Preventive Maintenance Checklist and monitored equipment health via IoT sensors. Result:

- 40% reduction in breakdowns
- Improved plant uptime
- Real-time efficiency tracking
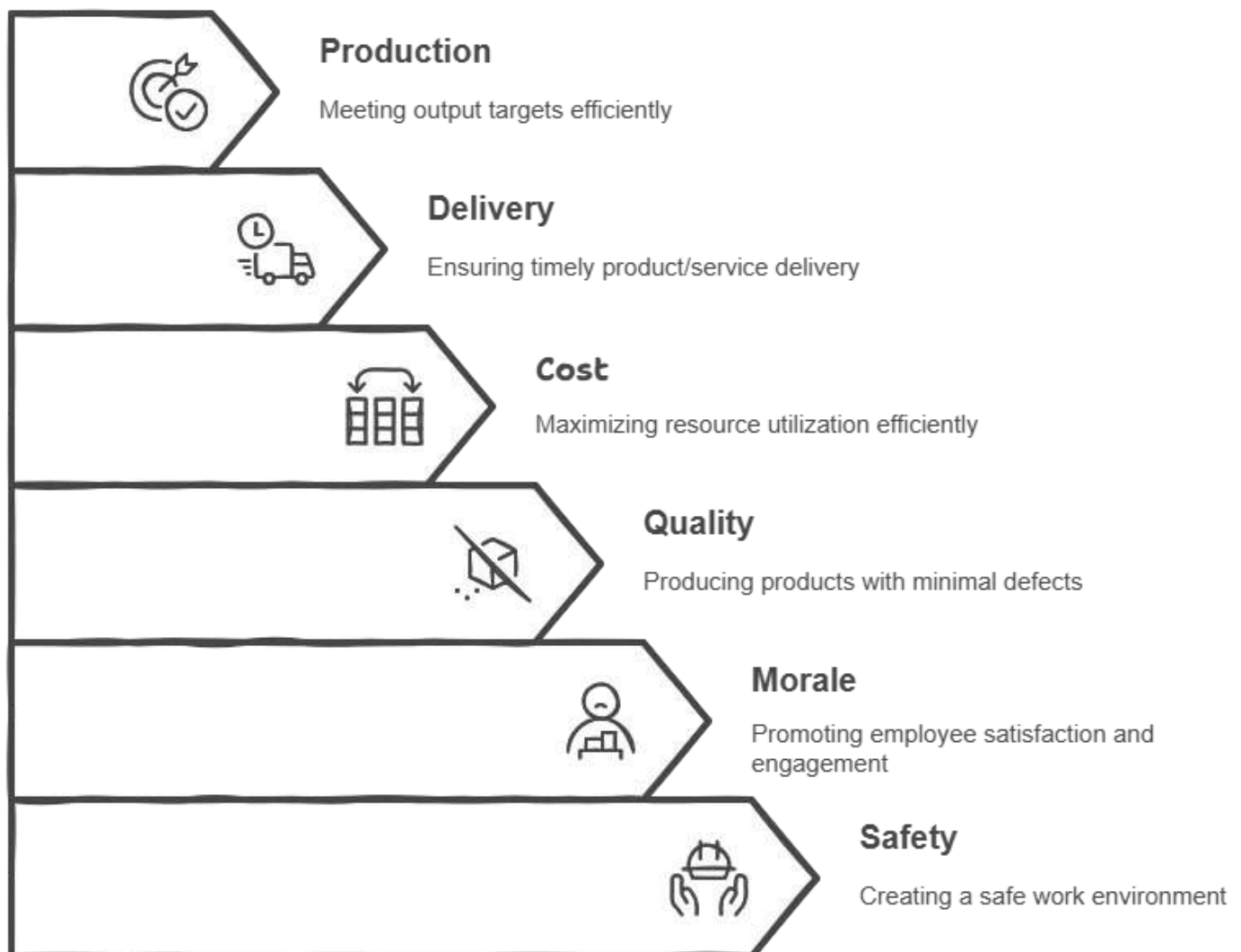
# Maintenance
## Understanding PQCDSM

## A Framework for Operational Excellence

PQCDSM is a performance management methodology used across manufacturing, logistics, and service operations to track and improve six critical dimensions of business performance

### Operational Excellence Pyramid

**Production**
Meeting output targets efficiently

**Delivery**
Ensuring timely product/service delivery

**Cost**
Maximizing resource utilization efficiently

**Quality**
Producing products with minimal defects

**Morale**
Promoting employee satisfaction and engagement

**Safety**
Creating a safe work environment

# Maintenance
## Understanding PQCDSM

## Example of PQCDSM

PQCDSM of an automotive plant assembling compact SUVs.

- Production: Target 1,000 vehicles, actual 950 (robotic welding line downtime)

- Quality: 5 defects out of 950 (within acceptable limit)

- Cost: Energy usage is 3% higher due to overtime in the paint shop

- Delivery: One customer order was delayed due to a production shortfall

- Safety: One minor slip incident near the fluid fill station (no injury)

- Morale: High engagement – 20+ suggestions submitted by team members

This indicates overall performance was stable in quality and morale, but production delays impacted cost and delivery.

Safety incident requires preventive follow-up. Actions will focus on resolving equipment issues and managing overtime to maintain cost targets.

# Maintenance
## Understanding PQCDSM

## Why PQCDSM Matters

PQCDSM is not just a monitoring tool—it's a cultural framework that drives visibility, alignment, and continuous improvement.

It ensures that everyone—from the shop floor to leadership—is focused on shared objectives and understands how their role impacts performance.

| 1 | 2 | 3 | 4 |
|---|---|---|---|
| Identifying problems like defects early on. | Metrics are owned across the department. | Encourages actively solving problems. | Reinforces accountability within teams. |
| **Early Detection** | **Department Ownership** | **Proactive Solving** | **Team Accountability** |

**Example:** A food packaging company uses PQCDSM daily. When the "D – Delivery" indicator turns red for three consecutive days, the team investigates and finds that a vendor change caused raw material delays.

By identifying this issue quickly, the procurement team can switch back to the reliable vendor before it affects customers.

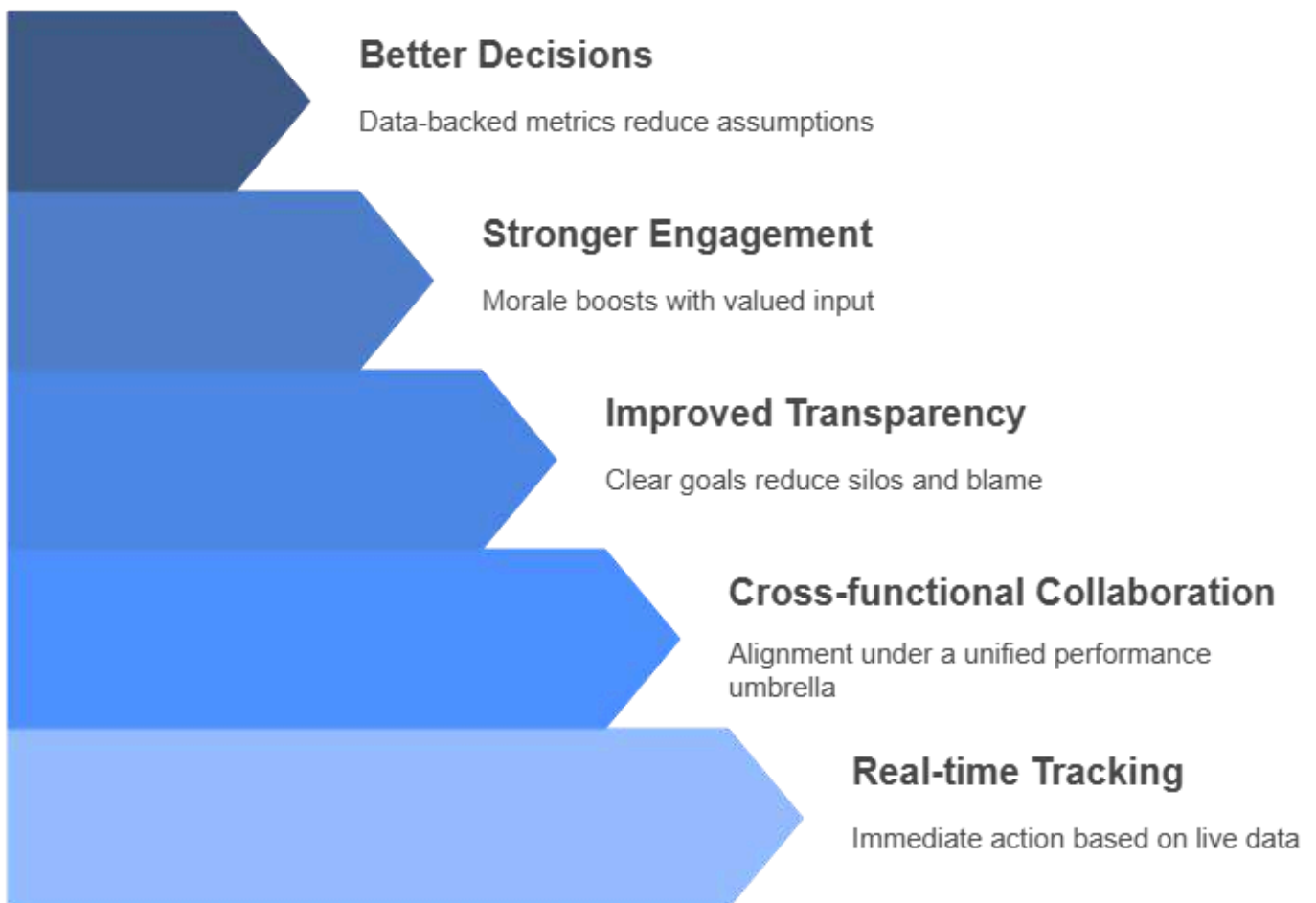# Maintenance
## Understanding PQCDSM

### Implementing PQCDSM

✓ Daily Visual Boards: Display the six KPIs clearly in real-time using physical or digital boards.

✓ Color Coding: Use green (on track), yellow (attention needed), and red (issue) for instant visibility.

✓ Team Ownership: Assign specific team members or departments to each pillar (e.g., Delivery = Logistics).

✓ Root Cause Analysis (RCA): When a red flag is raised, use tools like 5 Whys to determine and address root causes.

✓ Tiered Daily Reviews: Start with team huddles, followed by supervisor and management reviews.

# Maintenance
## Understanding PQCDSM

### Benefits of PQCDSM

**Better Decisions**
Data-backed metrics reduce assumptions

**Stronger Engagement**
Morale boosts with valued input

**Improved Transparency**
Clear goals reduce silos and blame

**Cross-functional Collaboration**
Alignment under a unified performance umbrella

**Real-time Tracking**
Immediate action based on live data

A cement plant saw major benefits after PQCDSM was implemented:

- Defects (Quality) dropped 25% due to better process audits.

- Delivery performance improved by 18% as teams synchronized shift planning and transport.

# Maintenance
## Understanding PQCDSM

## Challenges in PQCDSM

- Lack of understanding: Teams may not fully grasp what each pillar means.

- Data inconsistency: Inaccurate data entry can lead to poor decision-making.

- Red fatigue: Teams ignore repeated red flags if there's no follow-up.

- Ownership gaps: Metrics fail if no one is clearly responsible.

## Solutions

- Train all staff levels on each PQCDSM pillar and its importance.

- Standardize data collection (e.g., using barcodes, checklists, software integration).

- Implement action tracking so that issues flagged are resolved and reviewed.

- Link metrics to KPIs and appraisals to drive personal accountability.

# Maintenance
## Understanding PQCDSM

## Example: Challenges in PQCDSM

In a textile factory, the same quality defects (Q) appeared weekly, but no action was taken. The company appointed a Quality Leader responsible for RCA and follow-up.

Weekly tracking now includes not only metrics but action outcomes, leading to a 40% drop in defects over two months.

Without accountability and feedback, PQCDSM loses impact. Structured problem-solving turns red flags into real improvements.

| Pillar | Focus Area | Common Metric | Ownership |
|--------|-----------|---------------|-----------|
| P | Output | Units produced vs. target | Production Team |
| Q | Quality | Defect rate, First-pass yield | Quality Dept |
| C | Cost | Material waste, Overtime costs | Finance/Ops |
| D | Delivery | On-time shipment % | Logistics |
| S | Safety | Incident rate, Near-misses | EHS Team |
| M | Morale | Employee feedback, Turnover | HR & Team Leads |

# Maintenance
## Improving Equipment Uptime and Response Efficiency

In maintenance and operations, it's essential to measure how long equipment performs, how fast teams respond, and how frequently failures occur.

Four core metrics — MTBF, MTTR, MTTF, and MTTA— help monitor system performance, plan maintenance, and reduce downtime.

## MTBF – Mean Time Between Failures

MTBF represents the average time that equipment operates without failure. It indicates system reliability over time.

## Why It Matters in Maintenance

- Helps schedule preventive maintenance

- Informs equipment reliability analysis

- Supports spare part forecasting

## Example

A generator operates for 2,000 hours with 4 breakdowns:

MTBF = 2,000 / 4 = 500 hours

# Maintenance
## Improving Equipment Uptime and Response Efficiency

## MTTR – Mean Time to Repair

MTBF represents the average time that equipment operates without failure. It indicates system reliability over time.
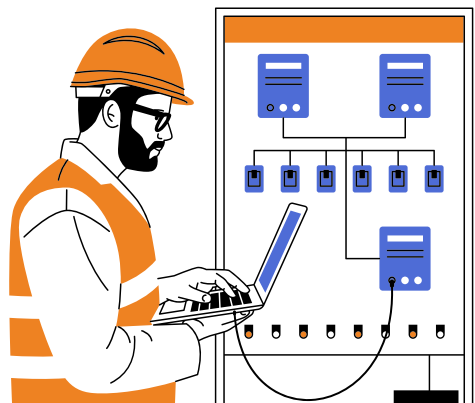
## Why It Matters in Maintenance

- Reflects team efficiency

- Affects total downtime

- Useful for SLA compliance and resource planning

## Example

Real-World Example
A pump failed 3 times, taking 6 hours total to fix:

MTTR = 6 / 3 = 2 hours

# Maintenance
## Improving Equipment Uptime and Response Efficiency

## MTTF – Mean Time to Failure

MTTF is the average time a non-repairable asset (like a lightbulb or fuse) lasts before failing.

## Why It Matters in Maintenance

- Helps plan part replacement intervals

- Improves product selection and design

- Reduces unexpected shutdowns

## Example

10 sensors fail after 10,000 hours of combined runtime:

MTTF = 10,000 / 10 = 1,000 hours

# Maintenance

## Improving Equipment Uptime and Response Efficiency

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## MTTA – Mean Time to Acknowledge

MTTA tracks the average time between an alert being raised and acknowledgment by the maintenance team.
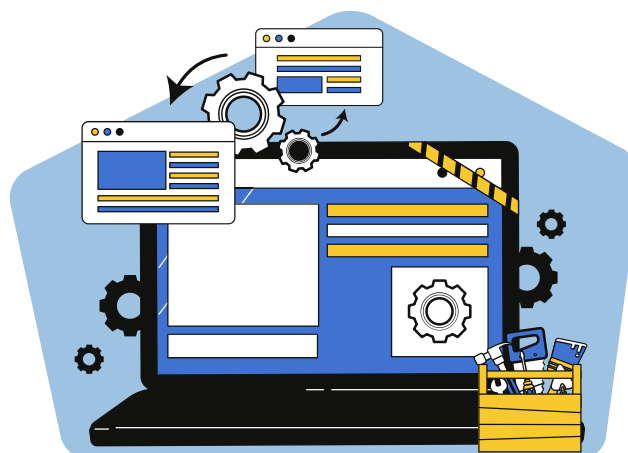
## Why It Matters in Maintenance

- Crucial for incident responsiveness

- Affects total resolution time

- Especially important in critical systems monitoring

## Example

3 alerts took 5, 10, and 15 minutes to acknowledge:

MTTA = (5 + 10 + 15) / 3 = 10 minutes

# Maintenance
## Improving Equipment Uptime and Response Efficiency

## Metrics at a Glance

| Metric | Meaning | Applies To | Goal |
|--------|---------|------------|------|
| MTBF | Time between failures | Repairable equipment | ↑ Increase |
| MTTR | Time to repair | Maintenance tasks | ↓ Decrease |
| MTTF | Time to first failure | Non-repairable items | ↑ Increase |
| MTTA | Time to acknowledge | Alert/incident response | ↓ Decrease |

Tracking and optimizing these four metrics gives maintenance and operations teams the power to:

- Improve equipment uptime

- Minimize disruption

- Increase efficiency

- Meet safety and service goals

# Maintenance
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1 | Maintenance Scope Creation | Defining the full scope of maintenance activities and responsibilities. |
| 2 | Maintenance Manual | Document outlining maintenance procedures, schedules, and safety protocols. |
| 3 | Preventive Maintenance Checklist - Sample | Sample checklist to guide routine maintenance and avoid equipment failures. |
| 4 | Breakdown Maintenance | Process to manage unplanned equipment failures and restoration procedures. |
| 5 | Root Cause Analysis Format | Standard format to identify and address the root causes of breakdowns. |
| 6 | Downtime or Efficiency Calculation Reports | Reports to track machine downtime and calculate operational efficiency. |
| 7 | Utility Consumption Reports | Records of electricity, water, and fuel usage to monitor and optimize resources. |
| 8 | Energy Audits with Verified Service Providers | Professional audits to evaluate and reduce energy consumption. |
| 9 | IoT Implementation Scope | Plan for deploying IoT devices to monitor and automate maintenance processes. |
| 10 | Integration with the ERP | Linking maintenance operations with ERP systems for seamless data flow. |

# Production

## The Backbone of Sustainable Industrial Performance

Production refers to the process of converting raw materials into finished goods or services using resources like labor, machinery, and capital.

## Key Aspects

✓ Planning

✓ Process Execution

✓ Monitoring & Control

✓ Output & Delivery

## Why is Production Important?

**Cost Efficiency**

Strategies to reduce waste and optimize output for profitability.

**Quality Control**

Ensuring consistency and customer satisfaction through high standards.

**Timely Delivery**

Meeting market demands and commitments through efficient logistics.

**Business Operations**

The essential function that generates revenue through product creation.

**Competitive Advantage**

Enabling growth, innovation, and profitability in the market.
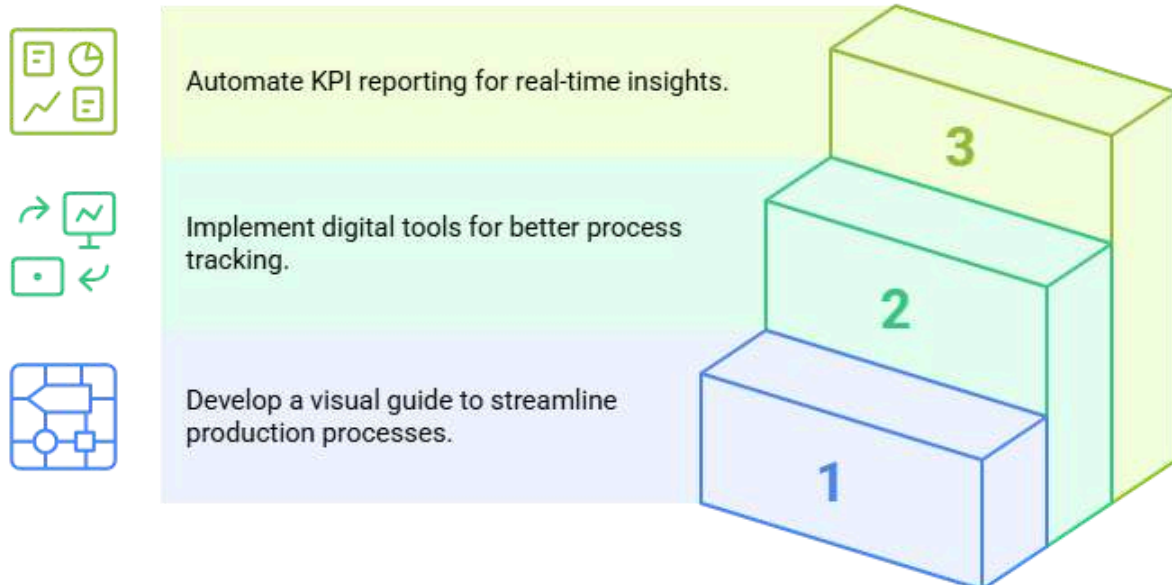
# Production

## The Backbone of Sustainable Industrial Performance

### Production Example – Auto Components Manufacturing

The company experienced frequent delays in deliveries and high rework rates, which negatively impacted customer satisfaction and operational efficiency.



Enhancing Production Efficiency

Automate KPI reporting for real-time insights.

Implement digital tools for better process tracking.

Develop a visual guide to streamline production processes.

The implementation of these actions led to significant improvements:

- 25% improvement in lead time
- 30% reduction in process waste
- Real-time monitoring of order fulfillment

# Production
## Our Deliverable

| S.No | Deliverable | Description |
|---|---|---|
| 1 | Type of Production | Identifying the production type: job, batch, mass, or continuous manufacturing. |
| 2 | Production Flow Chart | Visual representation of each step in the production process. |
| 3 | Production Planning Flow Chart | Diagram showing the workflow from planning to execution of production. |
| 4 | BOM (Bill of Materials) | Detailed list of raw materials, components, and quantities required to produce a product. |
| 5 | Digitalisation of Process Flow | Use of digital tools and systems to automate and track the production process. |
| 6 | Production Reports – Key Production KPIs | Reports tracking critical KPIs like output, yield, rejection rate, and downtime. |
| 7 | Areas Defining | Mapping and defining different zones in the production layout (e.g., assembly, QC, packaging). |
| 8 | Industry 4.0 | Adoption of smart manufacturing practices using IoT, automation, and AI. |

# Corporate Finance
## Understanding Corporate Finance

Corporate finance is a core function in any organization that deals with how companies manage their financial resources, investment decisions, and funding strategies to maximize value and ensure long-term sustainability.

## Purpose of Corporate Finance

Corporate finance is essential for managing a company's capital, investments, funding, and risks. It supports strategic decisions, ensures cash flow stability, and helps maximize long-term value while maintaining financial control and compliance.

✅ Maximize shareholder wealth

✅ Ensure financial sustainability

✅ Drive strategic financial decision-making

✅ Support business expansion and innovation

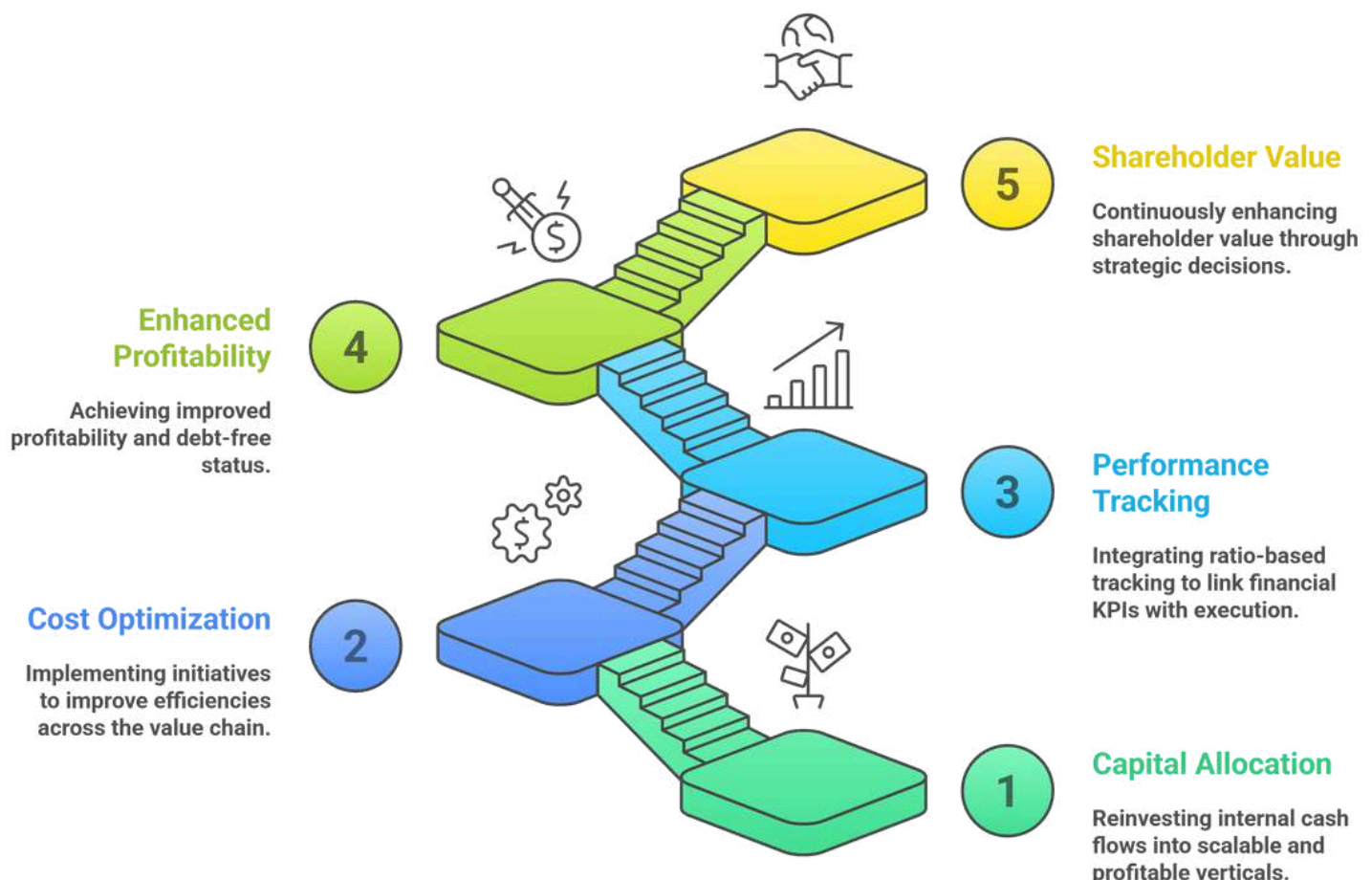✅ Maintain control over capital structure and cost of capital

# Corporate Finance

## Example: Strategic Financial Management at ITC Ltd.

ITC Ltd. used corporate finance to diversify beyond tobacco into FMCG, agri-business, and IT.

It focused on disciplined capital allocation, cost optimization, and ratio-based performance tracking. These strategies helped ITC boost profitability, stay debt-free, and enhance shareholder value consistently.

## ITC's Strategic Financial Journey



**5 Shareholder Value**
Continuously enhancing shareholder value through strategic decisions.

**4 Enhanced Profitability**
Achieving improved profitability and debt-free status.

**3 Performance Tracking**
Integrating ratio-based tracking to link financial KPIs with execution.

**2 Cost Optimization**
Implementing initiatives to improve efficiencies across the value chain.

**1 Capital Allocation**
Reinvesting internal cash flows into scalable and profitable verticals.

# Corporate Finance
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1 | **Finance MIS (Management Information System)** | Designing structured financial dashboards and reporting templates that offer real-time insights into revenue, costs, margins, and profitability across departments |
| 1.1 | Budgeting | Creating annual or quarterly budgets aligned with business goals, covering departmental and organizational spend plans with scenario forecasting. |
| 1.2 | Capital Planning | Capital Planning involves assessing and structuring a company's long-term funding needs, investment priorities, and capital allocation strategy to support sustainable growth and financial stability. |
| 1.3 | Sales and Marketing | Analyzing ROI on campaigns, customer acquisition cost, revenue per customer, and aligning sales goals with financial forecasts. |
| 1.4 | HR Budgeting | Structuring payroll planning, recruitment cost estimation, performance-linked incentive budgeting, and workforce productivity analysis. |
| 1.5 | Cash flow Improvement | Identifying cash leakages, improving working capital cycles, and suggesting measures like faster receivables, leaner inventory, or vendor negotiation to enhance liquidity. |

# Corporate Finance
## Our Deliverable

| S.No | Deliverable | Description |
|------|-------------|-------------|
| 1.6 | Ratio Analysis Training | Ratio Analysis Training teaches how to evaluate a company's financial health using key financial ratios, helping in better decision-making and performance assessment. |
| 1.7 | Ratio Practices | Ratio practices involve applying financial ratios to assess a company's profitability, liquidity, efficiency, and solvency for informed business decisions. |
| 1.8 | Cost Optimization | Cost optimization involves reducing expenses while maintaining or improving performance, helping businesses increase efficiency and profitability. |
| 1.9 | Valuation | We provide accurate valuations to help businesses make informed decisions on investments, mergers, and financial planning through our Empanelment consultant |

# Forecasting as a Product

## Predict Today, Perform Tomorrow

Forecasting as a product is a strategic decision-making tool that uses historical and real-time data to predict future trends, demands, or behaviors.
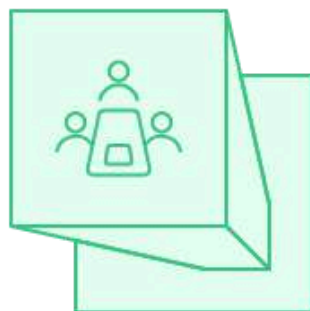
It uses dashboards or models and can be used repeatedly by decision-makers to improve planning in areas like sales, marketing, human resource operations, supply chain, or finance.
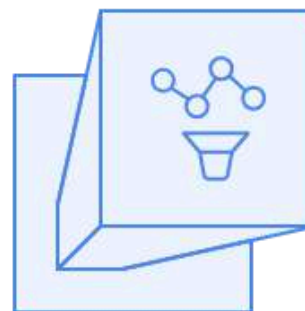
## What it's Importance?

**Benefits of Accurate Forecasting**

**Strategic Clarity**
Facilitates data-backed strategic choices for future scenarios.

**Competitive Advantage**
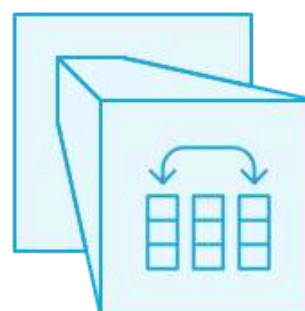Enables quick adaptation to market changes and trends.

**Operational Efficiency**
Enhances proactive staffing and supply chain planning.

**Better Planning**
Improves resource allocation and avoids inventory issues.
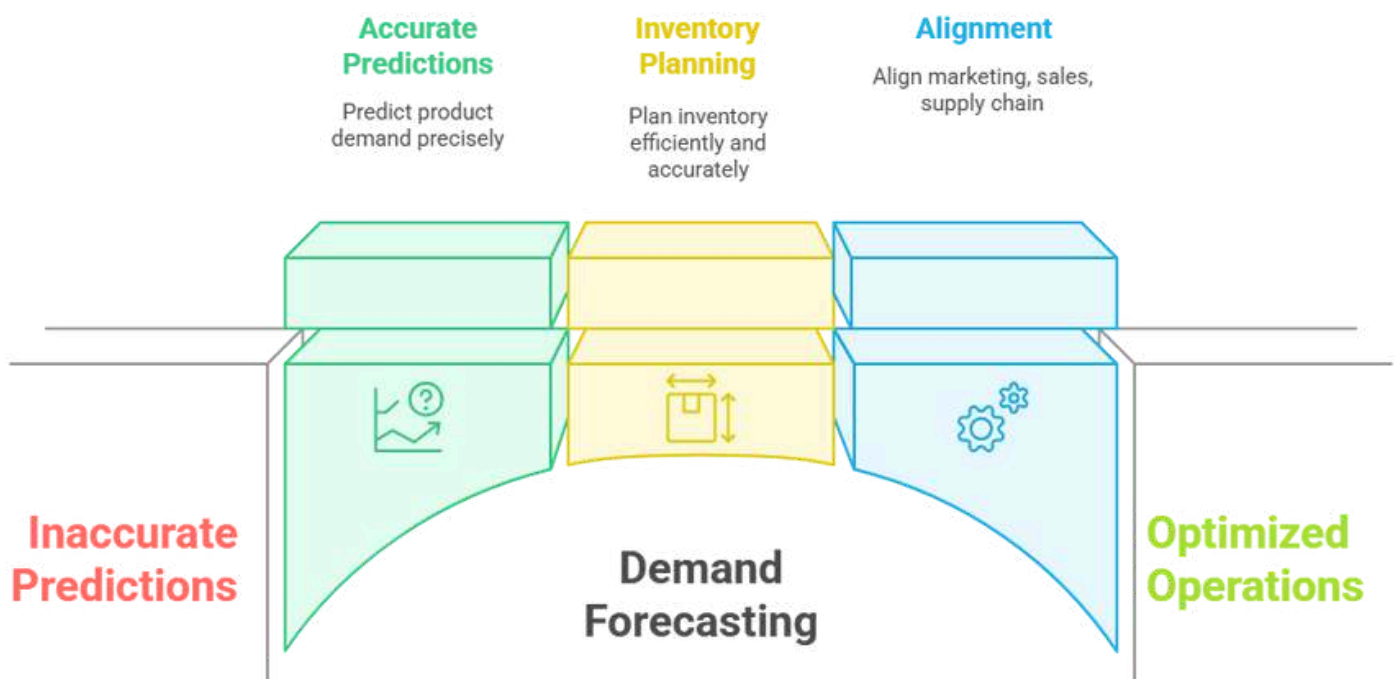
# Forecasting as a Product

## Predict Today, Perform Tomorrow

### Example: Unilever – Demand Forecasting

Unilever uses advanced demand forecasting as a business function to predict product demand across regions.



Example of Unilever

**Accurate Predictions** — Predict product demand precisely

**Inventory Planning** — Plan inventory efficiently and accurately

**Alignment** — Align marketing, sales, supply chain

Inaccurate Predictions

Demand Forecasting

Optimized Operations

Companies using accurate forecasts are quicker to react to market changes, customer trends, and risks.

This showcases how forecasting can become a core planning tool and enhance cross-functional alignment.
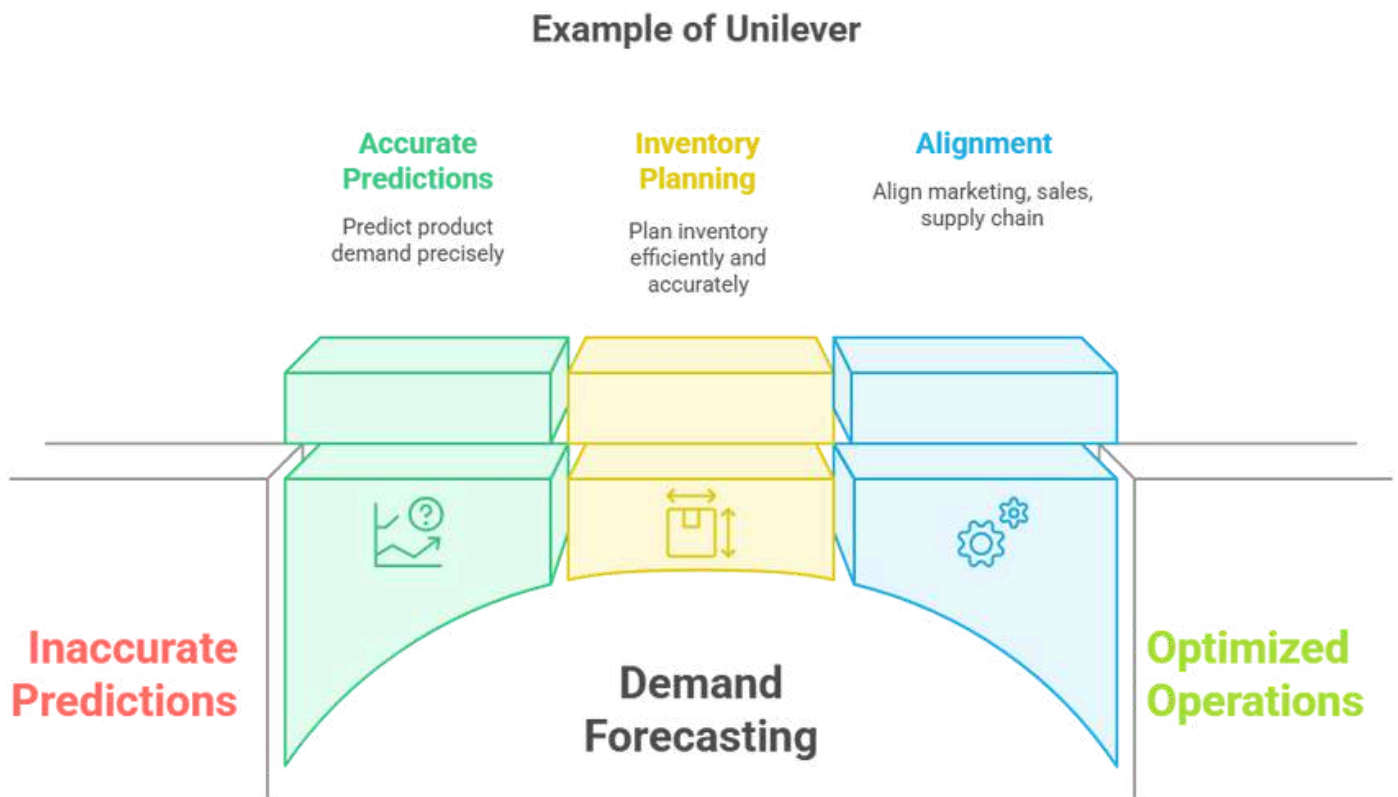
# Forecasting – SCM

## Predict Today, Perform Tomorrow

### Example: Unilever – Demand Forecasting

Unilever uses advanced demand forecasting as a business function to predict product demand across regions.



**Example of Unilever**

Companies using accurate forecasts are quicker to react to market changes, customer trends, and risks.

This showcases how forecasting can become a core planning tool and enhance cross-functional alignment.

# Forecasting as a Product

## Our Services

To provide strategic forecasting solutions that empower businesses to anticipate future trends, optimize resources, and make data-driven decisions.

✅ Sales Forecasting

✅ Demand Forecasting

✅ Operational Capacity Forecasting

✅ Market Forecasting

✅ Manpower/HR Forecasting

✅ Financial Forecasting

# Family - Managed Businesses

## Blending Legacy with Leadership for Generational Growth

A Family-Managed Business (FMB) is a company where decision - making is influenced by multiple generations of a family, who are closely involved in the business's operations, ownership, or both.

These businesses can range from small enterprises to large corporations.

## Key Characteristics

### ✅ Ownership and Control

Family holds significant ownership stakes.

Key positions (CEO, Director, etc.) are often held by family members.

# Family – Managed Businesses

## Blending Legacy with Leadership for Generational Growth

### Key Characteristics

✅ **Succession Planning**

Critical to ensure smooth leadership transition from one generation to the next.

✅ **Values and Culture**

Strong family values shape company culture, ethics, and goals.

✅ **Governance**

May lack formal governance structures, leading to issues in decision-making and conflict resolution.

✅ **Emotional Involvement:**

Decisions are often influenced by family ties and emotions, not just business logic.

# Family – Managed Businesses

## Blending Legacy with Leadership for Generational Growth

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### Advantages

✓ Long-term vision and commitment

✓ Strong brand loyalty and trust

✓ Quick decision-making (in early stages)

✓ Deep organizational knowledge

# Family – Managed Businesses

## Blending Legacy with Leadership for Generational Growth

## Challenges

- ✓ Succession issues (who takes over next?)

- ✓ Potential for family conflicts

- ✓ Resistance to external professional management

- ✓ Nepotism may affect merit - based decisions.

# Family – Managed Businesses

## Understanding Succession Planning

Succession Planning is identifying, preparing, and transitioning the leadership and/or ownership of a business from one generation or leader to the next.

It's not just about choosing a new CEO — it's about ensuring continuity, preserving legacy, managing risks, and preparing the business and people

## Key Elements of Succession Planning

| | Aspect | Explanation |
|---|---|---|
| 1 | Leadership Succession | Identifying who will lead the business in the future (family or non-family). |
| 2 | Ownership Succession | Deciding how shares, control, and wealth will be passed on. |
| 3 | Capability Development | Preparing successors through training, coaching, and hands-on business exposure. |
| 4 | Transition Planning | Creating a phased roadmap for leadership handover, with clear milestones. |
| 5 | Stakeholder Alignment | Aligning family, board, employees, and clients to avoid resistance or confusion. |

# Family – Managed Businesses

## Understanding Succession Planning

### Why Succession Planning Is Crucial in Family Businesses

- ✓ 65–70% of family businesses fail to pass beyond the second generation.

- ✓ Many founders delay succession decisions, risking business continuity.

- ✓ Without a plan, leadership vacuum or family conflict can arise.

- ✓ Succession ensures preservation of wealth, stability, and reputation.

# Family – Managed Businesses

## What's Corporate Governance

Corporate Governance is the framework of rules, roles, processes, and practices by which a company is directed, controlled, and held accountable.

It defines how decisions are made, who has power, how that power is checked, and how a business ensures transparency, fairness, and compliance to its stakeholders.

For family businesses, especially those scaling or professionalizing, corporate governance is the bridge between family control and business professionalism.

# Family – Managed Businesses
## What's Corporate Governance

### Key Elements of Corporate Governance

| | Aspect | Explanation |
|---|---|---|
| 1 | Board of Directors | Establishing a board with clear responsibilities for oversight and direction. |
| 2 | Management Accountability | Defining how the management team is supervised, evaluated, and compensated. |
| 3 | Transparency & Disclosure | Ensuring timely, accurate reporting to shareholders, regulators, and stakeholders. |
| 4 | Risk Management | Implementing structures to monitor and mitigate operational, financial, and reputational risks. |
| 5 | Compliance & Ethics | Adopting and enforcing legal, regulatory, and ethical standards of conduct. |

# Family – Managed Businesses

## What's Corporate Governance

### Core Pillars of Corporate Governance

**Foundations of Corporate Governance**

**Compliance**
Meeting legal and regulatory obligations.

**Accountability**
Ensuring responsibility and answerability to stakeholders.

**Fairness**
Treating all stakeholders equitably and justly.

**Transparency**
Providing clear and timely information to build trust.

**Responsibility**
Clarifying decision-making roles and outcomes.

Corporate governance is built on these five core pillars that is accountability, transparency, responsibility, fairness, and compliance, which collectively ensure ethical leadership, stakeholder trust, and sustainable business growth.

# Family – Managed Businesses

## What's Corporate Governance

### Why Corporate Governance Matters in Family Businesses

✓ Brings objectivity into decision-making

✓ Balances family interests with business needs

✓ Enables external investor trust and readiness for IPOs

✓ Supports scalability and long-term institutionalization

✓ Minimizes fraud, mismanagement, and concentration of power
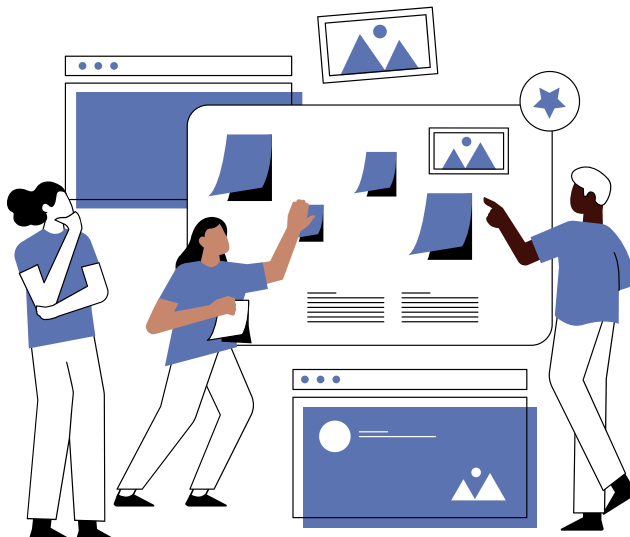
# Family – Managed Businesses
## Our Deliverables

## Family Managed Business

| S.No | Deliverables | Sub-Services |
|------|-------------|--------------|
| 1 | Family Governance & Alignment | • Family Constitution drafting<br>• Family Council/Assembly setup<br>• Vision & values alignment workshops<br>• Family meeting protocols<br>• Generational expectation workshops |
| 2 | Role Clarity & Boundaries | • Defining family vs non-family roles<br>• Employment policy for family members<br>• Accountability structure<br>• Performance-based incentives |
| 3 | Family Dynamics & Conflict Handling | • Interpersonal trust-building exercises<br>• Conflict resolution protocols<br>• Family exit policies<br>• Generational relationship coaching |
| 4 | Family Office Structuring (non-financial) | • Setting up a non-operational family office<br>• Next-gen forums or councils<br>• Governance training for family members |
| 5 | Legacy & Value Preservation | • Documentation of family legacy<br>• Integration of values into strateg<br>• Legacy branding workshops |

# Family – Managed Businesses
## Our Deliverables

### Succession Planning

| S.No | Deliverables | Description |
|---|---|---|
| 1 | Successor Identification & Assessment | • Successor capability benchmarking<br>• Internal vs external fit analysis<br>• Readiness assessments<br>• Stakeholder interviews |
| 2 | Leadership Transition Roadmap | • Multi-year succession timeline<br>• Co-leadership transition models<br>• Founder exit strategy<br>• Crisis/emergency plan |
| 3 | Ownership & Shareholding Planning | • Legal transfer strategy (wills, trusts)<br>• Tax and wealth preservation structuring<br>• Equity balancing among heirs<br>• Buy-sell agreement planning |

# Family – Managed Businesses
## Our Deliverables

## Succession Planning

| S.No | Deliverables | Description |
|------|--------------|-------------|
| 4 | Successor Development & Grooming | <ul><li>Leadership training paths</li><li>Coaching & mentorship</li><li>Business rotation programs</li><li>Board exposure</li></ul> |
| 5 | Communication & Alignment Strategy | <ul><li>Succession communication plans</li><li>Resistance and emotional management</li><li>Internal announcement strategies</li></ul> |
| 6 | Post-Succession Support | <ul><li>First 100-day plan for successor</li><li>Founder role redefinition</li><li>Monitoring and review protocols</li></ul> |

# Family – Managed Businesses
## Our Deliverables

## Corporate Governance Consulting

| S.No | Deliverables | Description |
|------|-------------|-------------|
| 1 | Governance Framework Design | • Board structure design (executive, non-exec)<br>• Committee formation (audit, risk, ESG)<br>• Governance charters & bylaws |
| 2 | Board Composition & Independence | • Defining board diversity & independence criteria<br>• Director recruitment advisory<br>• Board evaluation and refresh cycles |
| 3 | Policy Implementation & Compliance | • Code of conduct and ethics implementation<br>• Insider trading, whistleblower & compliance programs<br>• Statutory compliance frameworks |

# Family – Managed Businesses

## Our Deliverables

## Corporate Governance Consulting

| S.No | Deliverables | Description |
|---|---|---|
| 4 | Board Performance Management | Annual board effectiveness reviews<br>Director performance appraisals<br>Peer review systems |
| 5 | Risk & Accountability Oversight | Risk governance architecture<br>Delegation of authority matrix<br>Internal control evaluation<br>ESG and sustainability governance |
| 6 | Corporate Reporting & Transparency | Disclosure practices advisory<br>Annual report and board report enhancements<br>Stakeholder communication frameworks |