

## **Business Operating System**

Materials Queries LLC

# **Case Studies**

### Disclaimer

This brief manuscript is only an introductory overview of the subject matter. It is not intended as a tutorial, instruction, reference or problem-solving document.

Materials Queries welcomes your comments and an opportunity to work with you on your related projects.

### Abstract

An effective design and implementation of a Business Operating System (BOS) enables a business to bring thorough discipline to its ongoing operations, track its progress against its own key performance indicators, and make fact and data-based decisions in real time. Here, we provide you with a list of the most important attributes of tried-and-true BOS processes.

## **Case 1**

### **OEM Tier II Company**

#### **Client**

Automotive Tier II converter of large OEM vans into fleet vehicles for delivery services, international van and truck rental companies, and large, regional fleets. 3 primary locations in the Midwest with centralized commercial, finance, and operations support. Privately held.

#### **Issue**

Lack of a structured, disciplined, and accountable New Business Development process. Lack of visibility into new business targets, who they are, how large is the opportunity, probability to win, estimated start dates, sales, and estimated profitability, and specific actions needed, by who, to win the business.

#### **Solution**

Establish a structured, disciplined, and accountable new business development process to include Target List templates, and monthly target review sessions. Include specific steps within the process, who is involved in each step, and focused on the specific **actions** required by who to improve the probability of winning the new business. In addition to the target list template, key account planning templates were established for existing key customers.

This process was developed with the inclusion of each functional leader to ensure that there was proper “ownership” of the process by the business and includes specific work instructions for each entry and the monthly target review process.

#### **Results**

The organization has a very clear understanding of what new, potential business is in the pipeline, how large it is, estimated sales, and profitability. Most important is that this is a very proactive process focused specifically on what actions are required, by who, and when they will be completed. The business has a much better vision into their future growth.

## **Case 2**

### **OEM Tier II Company**

#### **Client**

Automotive Tier II converter of large OEM vans into fleet vehicles for delivery services, international van and truck rental companies, and large, regional fleets. 3 primary locations in the Midwest with centralized commercial, finance, and operations support. Privately held.

#### **Issue**

Lack of a structured, disciplined, and accountable quoting process leading to new business acquisition without proper business case analysis and unclear profit per job understanding. Too many disciplines within the business involved in quoting process and lack of “sign-off” accountability through the process.

#### **Solution**

Establish a structured, disciplined, and accountable quoting process from time of request for quote through to acceptance of purchase order. Include specific steps within the process, who is involved in each step, and who is the “primary” business function leader that will “sign-off” on each step before passing on to the next step. Specific work instructions were built for each step to include standardized templates for building the business case etc...

This process was developed with the inclusion of each functional leader to ensure that there was proper “ownership” of the process by the business.

#### **Results**

All functions have a clear understanding of when each function is involved and, more importantly, when they are NOT involved in the process. Each function has a very clear understanding of who is responsible for sign-off prior to sending the project to the next stage. There is a very clear understanding of the key criteria for identifying new business, and profitability expectations. Overall profitability has improved.