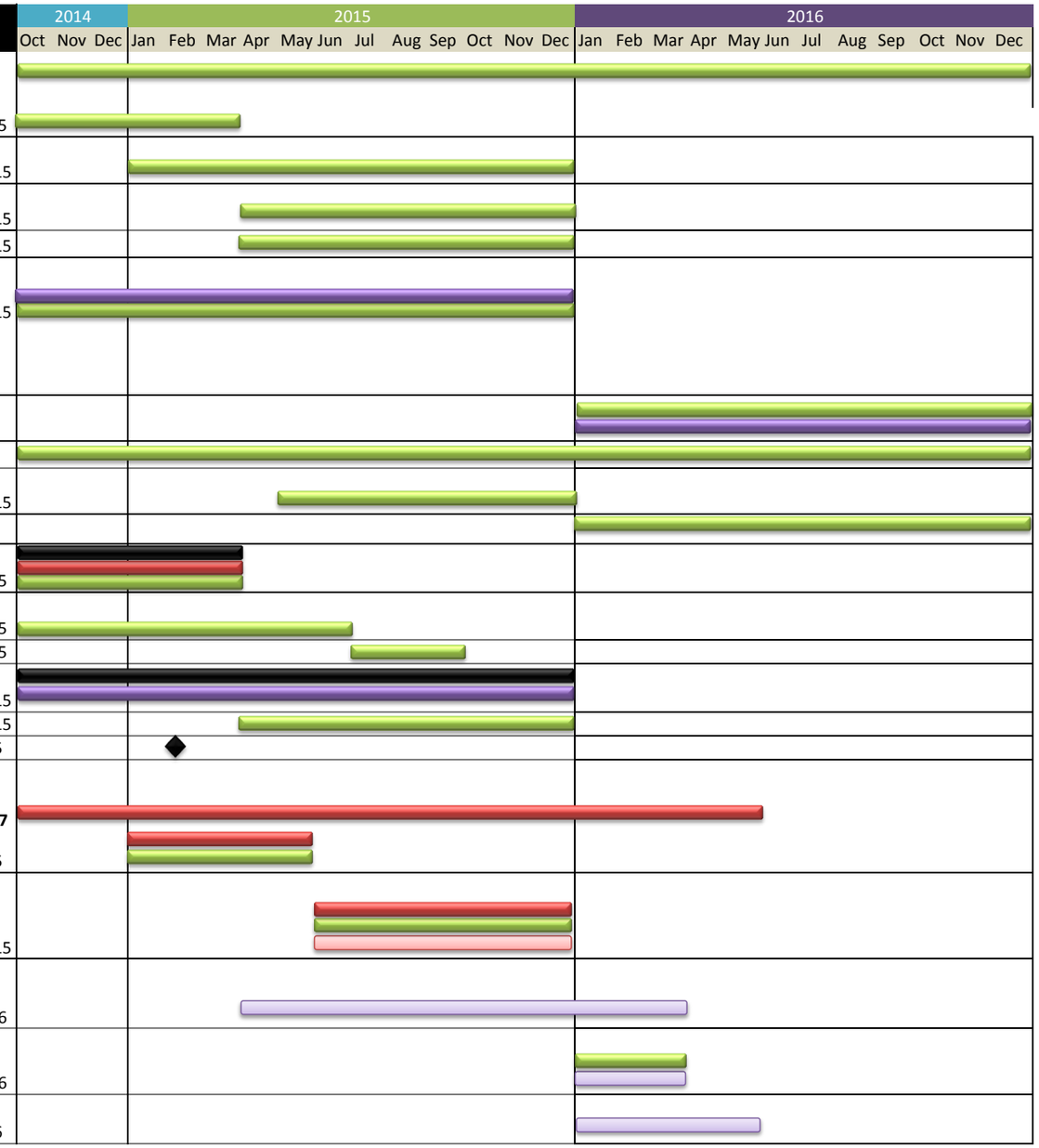
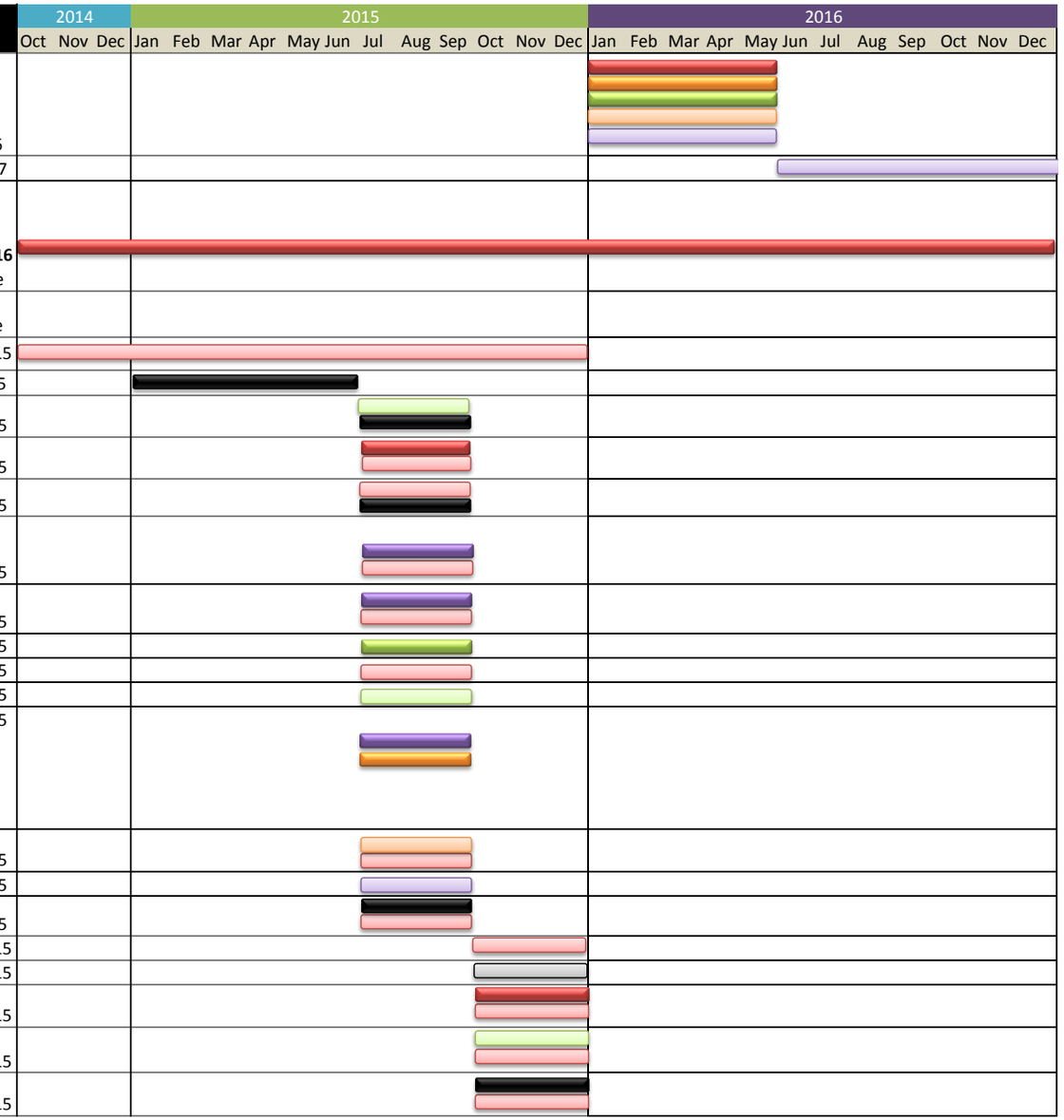
Sample Project Action Plan

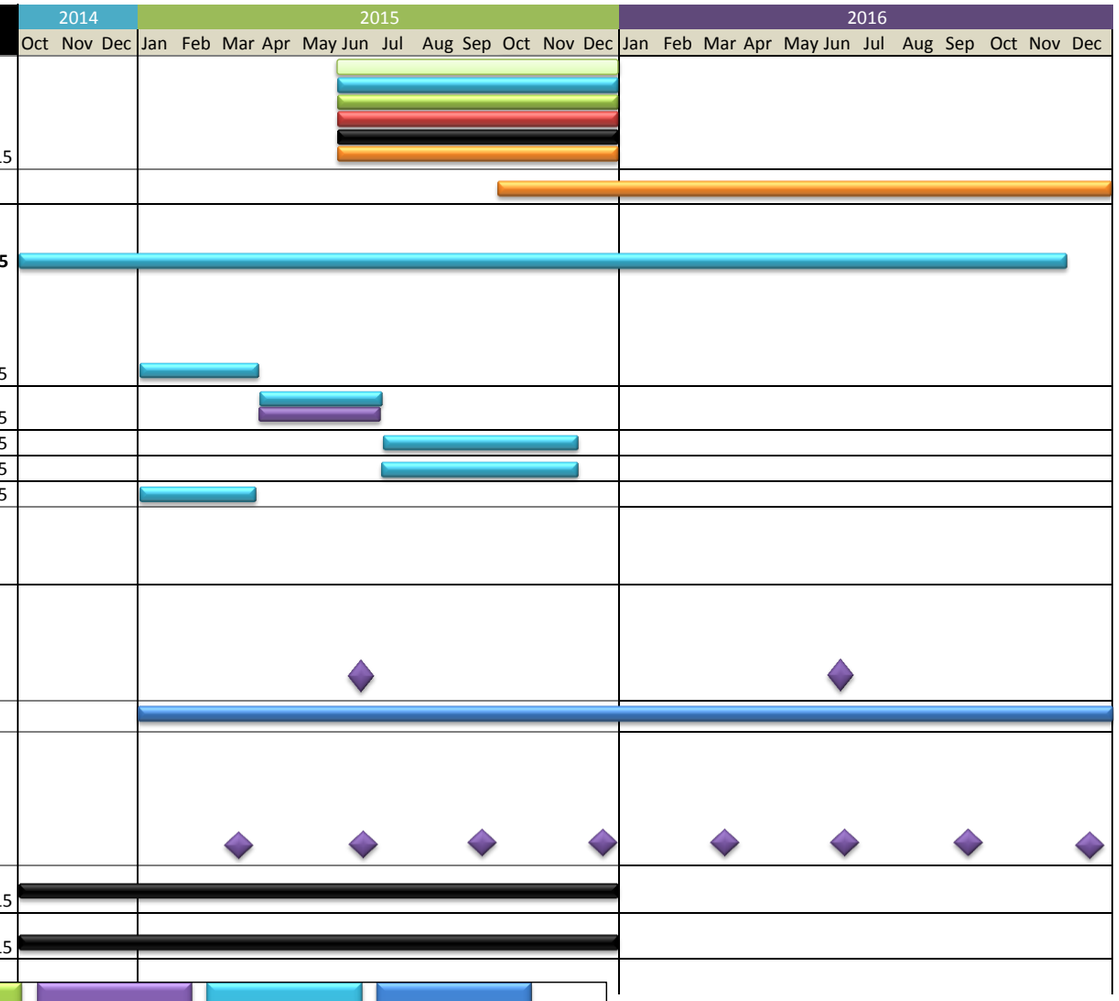
Number	Initiative	Champion	Duration	Start	End
1	**Human Capital Planning**	**Larry**	**∞**	**10/1/2014**	**ongoing**
1.1	Recruitment				
1.1.1	Hire additional HR recruiting resource	HR	181	10/1/2014	3/31/2015
1.1.2	Provide Interviewing/New Hire Training for management personnel.	HR	364	1/1/2015	12/31/2015
1.1.3	Solidify college recruiting process to attract better talent at college level.	HR	274	4/1/2015	12/31/2015
1.1.4	Develop process for recruiting senior talent	HR	274	4/1/2015	12/31/2015
1.2	Training				
1.2.1a	Design more structured training in the areas of (program with external & internal components developed): a. Project Management b. Business Development (link to 4.2.2) c. COE (link to 3)	HR, Presidents	456	10/1/2014	12/31/2015
1.2.1b	Implement training program	HR, Presidents	∞	1/1/2016	ongoing
1.2.2	Leadership Development	HR	∞	10/1/2014	ongoing
1.2.3a	Create a structure that necessitates training for certain promotions and advancement opportunities	HR	274	4/1/2015	12/31/2015
1.2.3b	Implement structure	HR	∞	1/1/2016	ongoing
1.3	Compensation Matrix				
1.3.1	Design and implement new incentive & bonus structure	CEO, CFO, VP Talent	181	10/1/2014	3/31/2015
1.4	Retention				
1.4.1	Develop stronger onboarding strategy/process	HR	272	10/1/2014	6/30/2015
1.4.2	Implement onboarding strategy/process in 3rd Qtr	HR	91	7/1/2015	9/30/2015
1.4.3	New office location (decision to be made)	HR, President	456	10/1/2014	12/31/2015
1.4.4	Travel Guidelines (handbook for all locations)	HR	274	4/1/2015	12/31/2015
1.4.5	Travel expectations/philosophy	OC	0	2/1/2015	2/1/2015
2	**Technology Plan**	**Jane**	**820**	**1/1/2015**	**3/31/2017**
2.1	Hire consultants to scope	CFO, HR	151	1/1/2015	6/1/2015
2.2	Create and fill a high-level position (Director, CIO, etc) to provide leadership and guidance to all information technology initiatives. Candidate should possess significant expertise in the construction industry.	HR, CFO, Consultant	213	6/1/2015	12/31/2015
2.3	Assemble an internal team tasked with developing a specification manual that outlines the systems requirements for all facets of our business.	IT	365	4/1/2015	3/31/2016
2.4	Create organizational clarity with well-defined roles and responsibilities for all members of the technology and information management departments.	IT, HR	90	1/1/2016	3/31/2016
2.5	Develop technology plan - clear, concise direction for all technology related initiatives, both internally and externally (field/office)	IT	152	1/1/2016	6/1/2016



Number	Initiative	Champion	Duration	Start	End
2.6	Led by the new technology person and utilizing the internal team, begin the research necessary to identify if there are any on-shelf systems that are available to meet our needs.	IT, Internal Team	152	1/1/2016	6/1/2016
2.7	Select (type), purchase (create), train and implement new system	IT	303	6/1/2016	3/31/2017
3	**Acquisition Strategy (Captures process and timing, dates may vary & repeat for each acq.)**	**Jane**	822	**10/1/2014**	**12/31/2016**
3.1	Hire investment banking firm to assist in this effort	CEO, CFO			Complete
3.2	Define criteria for investment firm - size, culture, management, market	CEO, CFO			Complete
3.3	Have investment firm search the market	Consultant	456	10/1/2014	12/31/2015
3.4	High level CEO to CEO discussion with possible candidates	CEO	181	12/31/2014	6/30/2015
3.5	Non disclosure agreements	CEO, Legal	92	6/30/2015	9/30/2015
3.6	Financials/modeling/valuation	CFO, Consultant	92	6/30/2015	9/30/2015
3.7	Letter of Intent	Consultant, CEO	92	6/30/2015	9/30/2015
3.8	Due diligence process:				
3.8.1	Market/ Industry analysis	Consultant, Presidents	92	6/30/2015	9/30/2015
3.8.2	Customer attractiveness	Consultant, Presidents	92	6/30/2015	9/30/2015
3.8.3	People/management/human resources	VP Talent	92	6/30/2015	9/30/2015
3.8.4	Insurance	Consultant	92	6/30/2015	9/30/2015
3.8.5	Legal	Legal	92	6/30/2015	9/30/2015
3.8.6	Operations: Facilities Estimating Project management Systems and processes	Presidents, Operations	92	6/30/2015	9/30/2015
3.8.7	Safety	Consultant, Safety Director	92	6/30/2015	9/30/2015
3.8.8	IT	IT	92	6/30/2015	9/30/2015
3.8.9	Accounting/financial/taxes	CEO, Consultants	92	6/30/2015	9/30/2015
3.8.10	Trustee/ ESOP valuator involvement (depending on size)	Consultants	92	9/30/2015	12/31/2015
3.8.11	BOD approval	Board	92	9/30/2015	12/31/2015
3.9	Financing	Consultant, CFO	92	9/30/2015	12/31/2015
3.10	Legal	Consultant, Legal	92	9/30/2015	12/31/2015
3.11	Closing	Consultant, CEO	92	9/30/2015	12/31/2015



Number	Initiative	Champion	Duration	Start	End
3.12	Develop strategy to integrate	ExComm, Operations	213	6/1/2015	12/31/2015
3.13	Implement/integrate	Various, Operations	∞	9/30/2015	ongoing
4	**Business Development**	**Nancy**	**426**	**10/1/2014**	**12/1/2015**
4.1	Increase customer retention as defined by corporate strategic plan				
4.1.1	Implement a Customer Relationship Management (CRM) system within each brand. Steps to execute the following include:				
4.1.1a	Determining a champion for the effort	Marketing	89	1/1/2015	3/31/2015
4.1.1b	Evaluating CRM systems	Marketing, Presidents	90	4/1/2015	6/30/2015
4.1.1c	Implementing the system	CRM Champion	153	7/1/2015	12/1/2015
4.1.1d	Training all parties to use the system	CRM Champion	153	7/1/2015	12/1/2015
4.1.2	Develop marketing plan targeted at existing customers	Marketing	88	1/1/2015	3/30/2015
4.2	Drive growth with new business as defined by the corporate strategic plan.				
4.2.1	Implement CRM (see 4.1.1)				
4.2.2	Provide formal sales training for all business development staff(created under 1.2.1), to be completed once a year by an outside sales trainer with new staff. Each member of business development will be required to attend training. Presidents will be responsible for entering all sales staff into the training.	Presidents	∞	7/1/2015	annual
4.2.3	Initiate bi-weekly calls between all business development staff	BD Staff	∞	1/1/2015	ongoing
4.2.4	Require quarterly in-person presentations by BD staff during subsidiary board of directors meetings. These meetings will provide updates on new business pursuits and overall sales strategies. The OC will determine which staff present - those associated with vertical markets only or also locally-focused people.	Presidents	∞	1/1/2015	ongoing
4.2.5	Determine reporting structure/rules of engagement and compensation strategy for Business Development staff.	CEO	456	10/1/2014	12/31/2015
4.2.6	Evaluate if a new position at corporate is necessary to manage sales strategies and provide oversight to BD staff nationally.	CEO	456	10/1/2014	12/31/2015



CEO	CFO/ Finance	HR/ VP Talent	Presidents	Marketing	Business Development
Operations	Board of Directors	Consultants	Legal	IT	Safety