



# Introductory On-Site Visit

## Objectives

The Introductory On-Site Visit provides an opportunity for J. E. Boyer Company to become acquainted with the company's products, processes, and people. It also allows me to introduce the capabilities and methodologies of J. E. Boyer Company, Inc.

More importantly, the visit is a forum for the company's management team to share specific problems, opportunities, and improvement needs. Having a good understanding of your needs is essential for me to outline a preliminary action plan.

## Pre-Visit Preparation

To help ensure the visit is productive, preliminary information (as appropriate) is gathered prior to the visit and may include: an annual report, a product catalog, an organization chart, current improvement plans, financial information, a business plan, and key performance measures.

## Typical Agenda

7:30 - 8:30	Check in with the host and get ready for the 8:30 presentation.
8:30 - 9:15	Make a brief presentation about J. E. Boyer Company, Inc. and discuss why I am here. This meeting includes the President and his/her staff.
9:15 - 10:30	Tour the facility.
10:30 - Noon	Speak with selected people to understand the company's needs. Interviews are generally 30 minutes.
Noon - 1:00	Have lunch with selected management team members.
1:00 - 2:00	Continue interviews.
2:00 - 2:30	Prepare the wrap-up.
2:30 - 4:30	Conduct the management wrap-up meeting. This is a forum for the company's management team to collectively discuss improvement needs, and for me to provide some initial feedback. This meeting includes the President and his/her staff.

## What Next?

At the conclusion of the wrap-up meeting, we will collaboratively determine if there is any interest in working together. If so, I will prepare a specific proposal containing project objectives, work steps, schedule, resources, team composition, and costs. This proposal will be presented to the management team in a follow-up meeting another day.

## Cost

Travel expense is the only cost for this one-day visit.



***Call me today to  
schedule a date!***

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