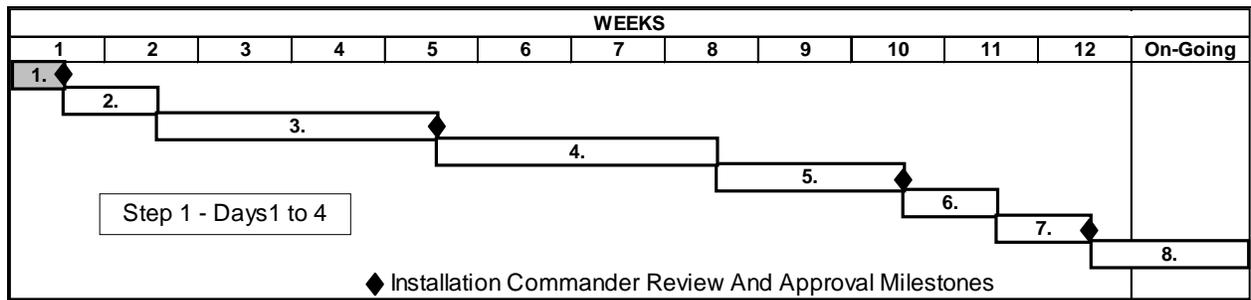


## STEP 1: ESTABLISH AND CHARTER THE BUSINESS UNIT ANALYSIS TEAM



### 1.1 OVERVIEW

The purpose of Step 1 is for the installation commander to establish and charter a team to perform the business unit analysis for the installation. A team with a varied experience base will likely provide the breadth and depth of analysis required.

### 1.2 TEAM CHARTER

A written charter from the CO as the sponsor of the study will empower the team and define the parameters for the business unit analysis. A charter which formalizes the parameters for the analysis also helps ensure that everyone concerned understands the study is the CO’s initiative. In turn, this will help garner cooperation from managers and others throughout the installation.

The charter should describe the purpose of the study as well as its general scope and the expected results of the study. It should also set a target date for completion of the study along with target dates for interim progress reports, if desired.

**CO Tip:** A worksheet is provided in Exhibit 2 to help structure the charter and select team members.

### 1.3 TEAM COMPOSITION

#### 1.3.1 Leadership

As in any endeavor, the leader should have good leadership skills as well as technical competence to perform the business unit analysis for the installation. He or she should be skilled at planning meetings, facilitating analytical thinking in a group environment, and keeping group discussions on track.

The team leader will have a distinct advantage if he or she has a good “systems sense” and is intuitively able to track cause and effect in various analyses. It will also be helpful if the leader is knowledgeable of installation customers and their needs and concerns.

**CO Tip:** Recommend you designate a senior individual as team leader and charge him/her with ensuring that the study charter is followed and the study is completed on time.

#### 1.3.2 Membership

The greater the breadth of experience on the team the better the analytical results are likely to be. Accordingly, the team should include top level thinkers from those core business areas that will likely constitute the areas under study. The Installation Core

Business Model shown in Exhibit 4 in the Step 3 section of this guide can serve as a reference when considering team composition.

**CO Tip:** Recommend at least one team member from each Core Business area shown in the IMAP Installation Core Business Model in Exhibit 4.

You can select individual team members, have core business area managers select them, or delegate selection to your team leader.

### **1.3.3 Facilitation Support**

Use of facilitation and technical support services in selected steps or throughout the BUA process can provide significant leverage in using your existing in-house resources to meet these objectives. Various sources include: outside consultants, claimant resources, and other activities.

## **1.4 TEAM PLANNING**

Once the team has been empowered, they should study this guide and develop a task management plan for conducting the BUA. This plan should include items such as: identification of main tasks and time line, assignment of individual team member responsibilities, and checklists to help accomplish individual tasks

**CO Tip:** Once the team has been incorporated, tasks have been identified and a timeline has been established, have the team leader brief you and your staff. Collect comments and recommendations from your staff and approve (or disapprove) the team's approach. Make it clear to your staff that this team is your team—the CO's team—empowered to conduct this study on your behalf.

## **1.5 PRODUCTS OF THIS STEP**

- Team and charter
- CO briefing and approval of team approach

**EXHIBIT 2: STEP 1 WORKSHEET**

**Worksheet**

**Step 1: Establish and Charter the Business Unit Analysis Team**

1. Define the Business Unit Analysis Team's charter. Identify:
  - a) The purpose of the study (e.g., re-engineering, prepare for competition initiative, etc.).  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  - b) The business areas to analyze.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  - c) Progress reports to be provided and target dates.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  - d) Final product desired.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  - e) The desired completion date for the study.  
\_\_\_\_\_

2. Identify the team leader.  
\_\_\_\_\_

3. Identify the team members.

<b>Office</b>	<b>Representative</b>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

4. Signature page (CO and team members).

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