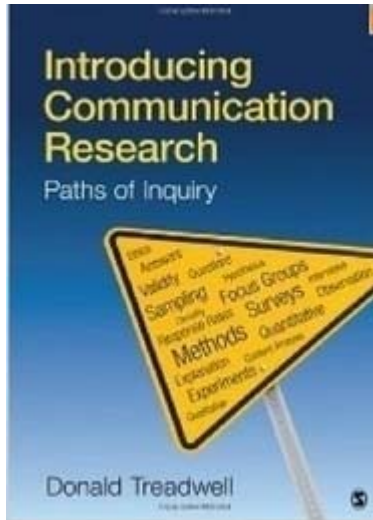


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[New Research Textbook](#)  
**Earle Clean Energy  
 Research Case Study  
 Published**

by [Richard Earle](#)  
 Regis Group Affiliate

*A case study about a clean energy media campaign on which I consulted has been featured in a new textbook by Professor Donald Treadwell of the Department of Communications at Westfield State University in Massachusetts.*

Called "welcoming and interesting" by one reviewer the text is written for readers who are new to research. Professor Treadwell teaches course in communications research and public relations

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## August 2010

### Special Assessment Part #1

### **Why, When, and Who**

by [Marc Chinoy](#)  
 Regis Group President

*Because a special assessment is NOT a replacement for a proper planning sequence, the "normal" planning principles and cycle of monthly reviews and quarterly adjustments should be maintained to the extent possible. If this means adding a review step in place of the next scheduled assessment, this should be done.*

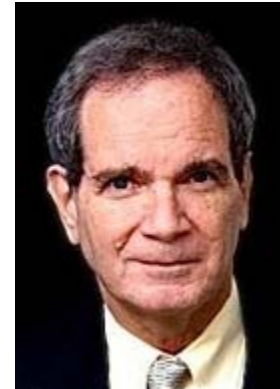
Please note: if you are reading this and saying, "We don't have a monthly review and for that matter not even a quarterly sequence of adjustments," establishing these methods is likely to be a high priority.

While there are many reasons why an organization should conduct a special assessment, ultimately, they all boil down to that moment when the assumptions of the existing business case are no longer viable.

#### **Why do this?**

Reasons for initiating a special assessment include:

- 1) An unforeseen, broad-scale change in the business environment
- 2) A sudden shift in the political



Marc Chinoy

### President's Letter **Rebound**

Welcome!

As our nation pushes toward the final stages of what has proven to be a wide-reaching reversal in our economy, many leaders are faced with an age-old dilemma - how to take advantage of the coming rebound without committing limited resources too soon.

#### **Assessment out of cycle**

The first part of the answer should be an "out of cycle" internal and external assessment. While the assessment phase of planning is a key part of a "calendar-based" sequence, occasionally events catch us off balance. When this happens, it can be

at Westfield State.

### Shaped by Research

The case study describes how a media campaign on which I consulted for the Clean Energy States Alliance and SmartPower was totally shaped by focus group research.

### Counter-intuitive

The New York ad agency Gardner-Nelson designed the study, and by the end of the second focus group, we knew we would be designing a Creative Brief which was totally counter-intuitive; much different from what we had predicted.

The essential attitude of our target group toward clean energy was quite different from what we had anticipated. And we used some very innovative methods to find out what they really felt. The focus groups led us to a complete revision of our strategic approach.

### The People don't Lie

I continue to believe that with a properly-facilitated focus group, the people don't lie. In this case study it was proven once again.

*A shortened version of the study may be found in last [September's Agenda](#)*

## Check out the new Posts on our Blog

If you haven't visited our "Tip of the Hat" (Positive posts only) Regis Blog, now might be a good time.

### backdrop

3) The aftermath of a merger or acquisition of consequence

4) The hidden internal management difficulty has started to become apparent. (Example: "Standing" cross-division reviews have been cancelled two quarters in a row)

5) A chronic inability to resolve one or more key leadership issues that have spilled over into open discord

6) A significant or unforeseen shift in governance of the group at the regional or national level

7) The top leadership has changed too rapidly to be accommodated in the existing long range planning sequence

8) New, aggressive, and unforeseen competition appears

If your organization is facing any of the examples listed above or is in a similar serious predicament, it is important to determine promptly how soon a special assessment can be initiated.

### When should this be done?

1) As soon as the assumptions of the existing business case are no longer viable (Example: If profitability is drastically reduced or reverse for two successive quarters)

2) As soon as the nature of an external change of consequence has become clear (Example: A major competitor has introduced an unexpected new product line)

3) As soon as new top leadership is in place

### Who Should Make This Work?

In order for a special assessment to be effective it is important to set the right criteria for who should be involved, along with their roles and responsibilities. This calls for:

important to jump ahead of the calendar in order to better understand our position and prospects in real time.

### Near-term enhancement

For many of us the current time is one of those moments. Without intending to imply that a proper plan review sequence should be abandoned (far from it!), the next three Agenda Newsletters will take a focused look at methods for conducting an assessment out of cycle, including key suggestion as to how this might be a step toward enhancing revenue in the near term.

Our exploration will be in three parts; Part One will review the "Why, When, and Who" of a special assessment. Part Two will focus on how best to proceed, and the final installment will address how to integrate this special effort into ongoing strategic and operational planning without causing disruption.

Best luck and plan well...

*Marc*

There are two new posts about State Farm Insurance and the Hulu Web Site that are worth checking out.

#### Send us a Post

And while you're there, if there's a company or person that you think deserves a comment or a new Post, just follow directions and send it on. We'd love to hear from you!

[Regis Blog](#)

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- 1) A composite/core team representing a spread of responsibilities, viewpoints and skills
- 2) Individuals designated by the CEO (in writing)
- 3) A team capturing a range of talents that might include:
  - a) Market or constituent knowledge
  - b) Operational expertise
  - c) Financial expertise
  - d) Media capability
  - e) Special connection to key stakeholders (such as governmental agencies; industry groups; employees present and past)

Once your group has established the Why, When, and Who of the special assessment process, you should proceed promptly to plan internal adjustments, which is the subject of the upcoming Part Two of our Special Assessment Series.

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#### Focus on the Future

### Guest Predictions: Christine Sullivan

*Guest Predictions is a regular feature in which we ask leaders in a number of professions questions that affect us all.*

*Christine Sullivan is Executive Director, The Enterprise Center at Salem State University. She has served as Massachusetts Secretary of Consumer Affairs. She has also done extensive work in economic development and tourism, and was Chief of Staff in a Congressional office in Washington, DC. She received a BA from Vassar College and a Masters Degree in Public Administration from the Kennedy School of Government at Harvard University.*

*The Enterprise Center provides small business owners with the knowledge they need to maximize their business skills through more than 70 programs a year. They also provide this expertise to nonprofit organizations who make up a substantial share of New England's economy.*



Christine  
Sullivan



### BizSpeak: "Cooking the Books"

#### Definition:

Illicit modification of financials with the intent (dare we say it) to defraud

#### Related Terms:

White Wash, Bogus Numbers, Shell Game

#### How it Sounds:

"By the time we had finished COOKING THE BOOKS, you would have thought we were all the way underwater, when we were actually drinking cream"

*For More BizSpeak, check out the Book. [Click here.](#)*

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**Q: What changes in your professional environment in the past 3-5 years have you found to be the most beneficial?**

**A:**

The greatest change is the ability to communicate to thousands of people at lower cost. The advent of social networking has really enabled us to reach broader audiences at no cost other than our time. As we go forward we are seeking to use technology to create a small business community and link micro businesses locally and nationally.

**Q: What changes have been the most troubling to you?**

**A:**

The economy. It's one thing to know you have to work faster and harder in this world. It's another when you are rowing against the tide. Our small businesses are resourceful and committed and for that I am thankful. But this is a hard time for almost everyone.

**Q: How will globalization affect your professional area in the near term?**

**A:**

More and more US companies will seek to do business internationally and we need to better prepare them to do that. This means more programs in cross cultural training and exporting and importing. Our children must be required to learn at least one second language. Interestingly a recent study of CEO's of major US companies found that they had only one thing in common—all of them had lived and worked in another country.

**Q: What significant challenges might be anticipated in your professional area in the next few years?**

**A:**

As a business incubator we help small businesses learn the skills to successfully run their businesses. Our challenge is to keep in the forefront of the issues they face so we can provide them with the training they need. Whether it is a new "social media" effort, cloud computing, competing with China, or forming effective management teams, we have

to be able to help businesses meet those needs.

**Q: What are the greatest challenges confronting young professionals in Western culture today?**

**A:**

I think they face three challenges:

1. Finding a good job. While this recession lingers there are five applicants for every job.
  2. Competitiveness—when I graduated from college jobs were falling off the trees. Today's candidates must be strategic and competitive in their job searches. Networking is more important than ever. They need to understand that asking their friends for help is a sign of strength.
  3. Global knowledge—we do not educate people to be citizens of the world. It's not enough to know about your region or country. You need to keep up with the whole world.
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