

Step-By-Step Strategic Consulting

Tanya Rincon
School of Sustainability
Arizona State University

Executive Summary

Step-By-Step Strategic Consulting is the professional consulting organization being created by Tanya Rincon and Kindra Maples in Phoenix, Arizona. Taking the initial steps into entrepreneurship is difficult without a guide or professional network to lean on and Step-By-Step plans to be there to make it more attainable. This organization functions with sustainable business practices as the foundation of every decision that is made. Beyond the assumed assistance that comes with partnering with a consulting service, Step-By-Step is dedicated to developing and fostering a network of values aligned startups and entrepreneurs that are prepared to support one another. The classic approach to capitalism has created incredible innovation for our world as a whole but it has also created massive issues for our environment and the communities that each organization serves. Sustainability issues are pervasive in every community, ecosystem, and economy yielding complex worldwide problems. As the business world shifts to supporting a new generation, it's important to build resilient organizations prepared for the dynamic landscape that is currently forming. While the profession of business consulting and startup accelerators is not new, a new type of strategic business thinker is coming to be in the form of sustainable business practices. Step-By-Step Strategic Consulting aims to provide an additional option in the strategic consulting world, with sustainability at the center. Additionally, a roadmap has been created to provide a clear plan for future investors, clients, and employees. This plan includes a specific timeline detailing necessary steps to become a legitimate business legally, development plans for each business partner, and steps necessary for securing funding and strategic investors.

Mission: Step-By-Step guides and supports startup clients through the various stages of strategic growth with sustainable business practices as the foundation of success to create a positive impact environmentally, socially, and financially.

Vision: A collaborative network of values aligned organizations working together to accomplish their individual goals, while also supporting the success of the United Nations Sustainable Development Goals.

Step-By-Step Strategic Consulting

Introduction

It has always been a life altering decision to start your own business. Making this decision is becoming an increasingly riskier move to make with a strong sense of confidence and certainty for return on financial investments. In 2016 it was estimated that nine out of every ten new startups end up failing (Agrawal, Choudhary, & Krishna, 2016). That is a daunting statistic to face when the financial and time risk is usually largely personal. Thankfully, the concept of Startup Accelerators has come around over the past decade and has increased those odds to 23% when a partnering with an accelerator in comparison to going alone (Ahmed, Quinn, & Regmi, 2015). Step-By-Step Strategic Consulting believes that when sustainable business practices are used as a foundation for day to day business operations while also strategically collaborating with fellow startups, the chance of success increases. Kotter believes it is necessary to create a sense of urgency and build a guiding coalition in order to support legitimate change in the world (1996). By working with a select few organization in the early phases of Step-By-Step's establishment, the aim is to direct that urgency towards efficient processes that lead to sustainable financial gain in a reasonable time period while fostering the growth of a supporting coalition. Step-By-Step will build tailored value into financial investment and strategic planning for client organizations.

The classic view of success in the business world has always been a measurement of money. Traditional capitalism has one bottom line: profit. This approach to business has yielded excellent innovation over the decades and has funded worldwide development. However, traditional capitalism has also created some less than desirable consequences across the entire planet. The classic approach to business practices does not support the current needs of society. Paul Hawken puts forth the idea in his book *The Ecology of Commerce* that the primary goal of business is to provide a necessary service to consumers, not to make a profit (2010). He also pairs with this definition the observation that companies who successfully meet their customer's needs tend to yield a profit as a result (Hawken, 2010). This means it's time to evolve capitalism to something that organizations can be a part of and support the transition towards a sustainable future. By redefining what profit can look like, Step-By-Step will shape a future where people, planet and profit all function on the same plane. By taking a strategic approach and leaning on a reliable network, success is more attainable than ever.

Step-By-Step Strategic Consulting is comprised of two Stepmoms, Tanya Rincon and Kindra Maples, living in the Phoenix, Arizona area. The value in Step-By-Step comes from the specific core values present in Maples and Rincon and the way in which those values are implemented. Step-By-Step strives for a personable approach rather than the fill and go model that is currently available. Maples and Rincon decided to take a step back from themselves as an already solidified partnership to do a deep evaluation of personal values in addition to understanding how those personal values impact professional decision making. The team partnered with Brian Stinson of The PEAK Fleet Management Consulting and discovered some wonderful similarities as well as great complementary matches solidifying the shared values as a professional team. The specific set of values for each partner has been provided (see Table 1), each list being ranked in decreasing level of importance.

Table 1:

Kindra Maples	Tanya Rincon
1. Courage	1. Family
2. Confidence	2. Growth
3. Kindness	3. Empathy
4. Creativity	4. Wisdom
5. Family	5. Community
6. Trust	6. Balance

Note. Top Values for Kindra Maples and Tanya Rincon as determined via Values Exercise with The PEAK Fleet: Management Consulting Services

Both Maples and Rincon have the necessary expertise and available bandwidth to establish Step-By-Step Strategic Consulting with the primary focus to be on the Phoenix, Arizona market. By utilizing sustainability principles in the establishment of Step-By-Step Strategic Consulting it will be possible to create a flourishing consulting business able to provide a boutique style experience for all clients. In an effort to establish a strategic approach to the business foundation, a detailed SWOT analysis of specifics that influence the feasibility of this business's success is provided (see Table 2).

Table 2:

SWOT Analysis of Step-By-Step Strategic Consulting	
<p>Strengths:</p> <ul style="list-style-type: none"> • Well-established professional relationship between Maples and Rincon • Previous joint experiences to pull wisdom from (SciTech & SUNI) • Rincon: knowledge, personal growth and structural guidance provided from the education program • Maples: well developed professional social network 	<p>Weaknesses:</p> <ul style="list-style-type: none"> • Documented history of robust strategic consulting projects • Lack of dedicated public space to meet with prospective clients • Lack of specialized market focus based off respective professional experience
<p>Opportunities:</p> <ul style="list-style-type: none"> • Maples: Pepperdine Business Organization Certificate • Maples and Rincon: Salesforce Administrator Certification provided free of charge via VetForce (In progress: Spring 2020) • Networking events and entrepreneurship workshops available little to no charge throughout the Phoenix Valley • Cultivate relationship with Mac6 to utilize meeting spaces 	<p>Threats:</p> <ul style="list-style-type: none"> • Competition organizations have established reputation to outcompete Step-By-Step Strategic Consulting • Current personal financial needs reducing the reality of prioritizing projects associated with Step-By-Step Strategic Consulting • Individualizing approaches may end up consuming more resources that available in early stages

Note. SWOT Analysis of Step-By-Step Strategic Consulting regarding the establishment and success of the organization

Step-By-Step’s Future Roadmap

As the organization grows, a larger vetted network of professionals will continue to interact and search out mutual value opportunities. As this is a very personalized approach, steps in the process must be able to be rated by all parties involved in an effort to make the goals measurable. By establishing high level metrics for long term success such as 3, 5, and 10-year targets it will be possible to measure if legitimate success has occurred. The mission and vision of Step-By-Step are discussed below followed by a detailed roadmap.

Mission: Step-By-Step guides and supports startup clients through the various stages of strategic growth with sustainable business practices as the foundation of success to create a positive impact environmentally, socially, and financially.

Vision: A collaborative network of values aligned organizations working together to accomplish their individual goals, while also supporting the success of the United Nations Sustainable Development Goals.

Strategic Plan

The current plan to achieve the vision is broken into two main phases with ten specific steps between the two portions. A corresponding timeline highlighting specific goals and when they are to be reached is provided following this roadmap.

Phase 1: Strategic Establishment

1.A:

The initial establishment phase is focused on decision making within the Step-By-Step team. One of these items to consider is finalizing the organization name. Step-By-Step will also have to create a logo to pair with the chosen name. Once both tasks are completed, Step-By-Step will be able to file LLC paperwork so all subsequent work can be done under the official organization name. This will provide for little to no issues concerning documentation. This will be funded from the personal finances of the two founders. During this phase there would also be a deep evaluation of the current network of professional contact between Rincon and Maples. This will be done to develop a list of preliminary organizations to work with in the beginning phase of the organization before Step-By-Step takes on paid clients.

1.B:

This phase will focus on founder's educational development in an effort to create two strong entrepreneurs. Cho and Lee have found that educated entrepreneurs can create more business and lead to hiring more people which ultimately provides a social safety net for society (Cho & Lee, 2018, p.132). It has been previously determined that Tanya Rincon's argumentative score is rather low at 31 (Estrada, 2019). With this knowledge in mind, she has enrolled in COM 598: Negotiation Theory and Practice for Spring of 2020. She will be working on developing her

strategic negotiation skills to confidently deliver the necessary information to future investors and client organizations. Additionally, she has enrolled in TWC 543: Grant & Proposal Writing. Through the funding phase it will be necessary to send in quality applications to various grant opportunities and provide proposals to future investors.

Kindra Maples will also be enrolling in courses. She will be working through a set of four different entrepreneurial courses at Maricopa Community College to improve her professional skills to support the vision. The specifics of each course have been selected to support the future needs of Step-By-Step (See Appendix, Figure 1).

1.C:

This phase will include all of the necessary discovery to understand the various layers that impact the Arizona business, natural, and social landscapes. There needs to be a deep understanding of the Arizona business market that Step-By-Step intends to function and guide change within. Both Rincon and Maples are current and active members of the Arizona Chapter of Conscious Capitalism and have become a major presence within this community. Both Maples and Rincon are members of the programming committee. The aim is to leverage this connection to have an organic view of sustainable business trends in Arizona specifically. To further expand the view of current business trends in Arizona they will attend as many regional chamber meetings as their schedules permit. This will provide them with a view into the needs of each respective community and the decision makers that are present to address those needs.

This will be the appropriate phase for the team to bring a financial advisor onboard to help guide the team through the process of creating a revenue model. The team will need to have the financial needs solidified before they are ready to speak with potential investors. This phase of business development has the potential to be significantly influenced by the impending recession resulting from the COVID-19 pandemic. It has been found that entrepreneurship tends to shrink during a recession period which may lead to a longer discovery period for Step-By-Step (González-Pernía, Guerrero, Jung, & Peña-Legazkue, 2020, p.167).

1.D:

In this phase Step-By-Step will prepare to bring others into the journey. By the completion of this phase three main presentations will be completed. These presentations will be aimed at future investors, prospective clients, and potential staff. Additionally, Step-By-Step specific

material will be developed to share with all stakeholders. This will be done in the format of a QR code that links to an informational packet. This enables Step-By-Step to update the informational packet as time progresses as well as ease of sharing without the need for additional resources being used. The last portion of material that will be developed will be a set of business plan templates to show to prospective clients. The selection of plans will include retail, web based, services, and goods.

1.E:

Given that both Maples and Rincon are searching for full time jobs outside of the Step-By-Step project, they will need to branch out with effective and strategic support. At this phase there will not yet be any large funding pool, so Step-By-Step is developing an unpaid internship program that will provide college credit through Arizona State University to be deployed in the Fall of 2020. The type of intern associates Step-By-Step hopes to bring on board include students from The Walter Cronkite School of Journalism, The W.P. Carey School of Business, and The School of Sustainability. By bringing together a selection of different students Step-By-Step will create an environment for cross discipline growth for all intern associates.

1.F:

With the previously established foundation, Step-By-Step will begin to source a funding pool in this phase. Through the above discussed extensive discovery period outlined in phase 1. A-E Step-By-Step will be able to assemble a strategic selection of potential funders. As active professionals, Maples and Rincon spend a lot of time networking through the Phoenix area and will need to utilize their time spent networking to identify potential investors. Kotter believe in the importance of building a coalition with power believers as the foundation (Estrada, 2019). It will be crucial to strategically pick the list of potential investors so Step-By-Step can have as many power believers as possible in the early stages of establishment. Once this list of investors is agreed upon, a period of research specific to each of the identified investors will take place in order to ensure that Step-By-Step values align with their values. Additionally, having the ability to speak to each investor wants and needs when it comes to their portfolio will build further value between each investor and Step-By-Step. The initial financial goal is to reach \$25,000 in the funding pool by the end of 2021.

1.G:

By this point Maples and Rincon will be in business together for over two years. Both view it as necessary to use a portion of the funding to hire a business coach to help re-evaluate the personal values of each founder and how they are relating to the success Step-By-Step is searching for. Peter Senge describes personal mastery as approaching one's life as a creative work (2006). Having an outside perspective will be crucial at this stage in establishment as Step-By-Step assess the creative work they have put together thus far. A business coach will also be able to help the team develop an onboarding assessment program for prospective clients.

1.H:

In this phase Step-By-Step will consider the organization to be in full operation. The aim is to be taking on paid clients by this portion of the journey. The initial goal for paid clients is five by the end of 2022. This will be the main focus during this time period.

Phase 2: Sustainable Scale

2.A:

It will be necessary for Step-By-Step to collect and analyze data concerning the network and the impact being made. This data will include specifics from each business including the percentage of profit they redirect towards sustainable R&D, funding they direct towards employee development and retention, and amount of time and funding being put into the local community. This sustainability values survey will be conducted annually to ensure continued alignment as the network grows. From this, an annual values focus will be agreed upon as a network wide focus. Additionally, an annual measurement of client satisfaction will provide an easy data point to follow alongside growth.

2.B:

After the establishment of Step-By-Step and the initial pool of paid clients, the next step will be scaling the organization. Step-By-Step will build out a partner team to include a marketing associate, an events associate, and also a programming associate. Additionally, the team will have to bring on more consultants that share the same core values present in Step-By-Step. This will also help facilitate growth outside of the state of Arizona. The hiring process will be similar to the onboarding assessment program that Step-By-Step will be using for prospective clients. A networking event calendar will be created to provide a recurring set of events for like-minded clients to work with one another. Richard Pfeilstetter spent time working in the UK studying the

sociality of tech-entrepreneurs and argues “that ‘startup communities’ simultaneously encourage individualistic market-competition, contribute to feelings of local group-belonging and are narrative constructions promoted by entrepreneurs, corporations and the State.” (2017). It is the hope that supportive relationships will precipitate from our networking efforts. In this stage Step-By-Step will also establish a network wide project. It is important to empower our guiding coalition and I believe that having a network wide goal will provide a unifying opportunity to further empower our members (Kotter, 1996). With roughly four years of anticipated strategic growth, Step-By-Step has developed a timeline to support the various stages needed to reach the level of network wide collaboration (see Table 3).

Table 3:

Step-By-Step Strategic Consulting Implementation Timeline			
Phase #	Time Frame	Measurement of Success	Main Risk
Phase 1.a.	November 2019 - January 2020	The completion and approval of LLC paperwork reflecting an agreed upon business name and logo design.	Lack of creativity in name and logo creating may hinder future implementation and overall reach
Phase 1.b.	January 2020 – May 2020	Passing each class with a deep understanding of the material for strategic application within Step-By-Step	Balancing Step-By-Step necessities with a full time job search
Phase 1.c.	June 2020 – September 2020	Developing a comprehensive guide for internal use that summarizes statewide sustainability trends and general business trends. The addition of a financial advisor and the development of a revenue model.	Insufficient research and data gathered can lead to an unanticipated level of misinterpretation of the Arizona market
Phase 1.d.	October 2020 – December 2020	The completion of three specific presentations. The completion of five templates. QR virtual pamphlet completed.	Only having one type of presentation for each audience group may lead Step-By-Step to alienate subsections of each audience group
Phase 1.e.	January 2021 – May 2021	The completion and approval of an internship program through ASU. Bringing on three interns.	The internship needs as outlined by ASU may not support the needs of Step-By-Step
Phase 1.f.	June 2021 – December 2021	A funding pool at or above \$25,000	Having a low goal may lead the team to aiming

			low with their asks of potential funders
Phase 1.g.	January 2022 – March 2022	A revision of our business plan with the aid of a business coach to reflect our progress and barriers.	Without proper alignment with the business coach chosen Step-By-Step runs the risk of diluting the sustainability message that underlines everything being done
Phase 1.h.	April 2022 – December 2022	Five paid clients under contract with us	Limiting the initial group to five may leave the initial network with large skills missing
Phase 2.a	January 2023 – March 2023	Completion of first annual sustainability survey. Network wide sustainability values focus established. Client satisfaction measurement taken.	Misinterpreting data may lead to overcorrections in some areas and ignoring important issues
Phase 2.b	April 2023 – future	Build out our partner team, our operations team and begin facilitating a calendar of events for our organization.	The addition of events without a sufficient event team fully onboarded has the risk of spreading the two founders too thin at this stage in development

Note. Step-By-Step Strategic Consulting Implementation Timeline from November 2019 to April 2023

Conclusion

It is Step-By-Step's hope that through the implementation, and continual revision of this plan that the organization will see this vision become a reality. Sustainable business practices are necessary for the planet, communities, and economies to thrive. Step-By-Step Strategic Consulting is committed to maximizing the impact through our established network.

This two -phase approach to Step-By-Step Strategic Consulting creates value in the capital that each organization is investing into the startup. By joining this collaborative network there is an increased chance each organization can overcome the various challenges that a business may encounter through establishment and growth. By creating an environment of open collaboration Step-By-Step also opens itself up to potential collaboration. The continual growth that is necessary to remain relevant in the sustainability world will be worked through as a full network.

References:

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Appendix

Figure 1:

Kindra Maples' Education Path		
Course	Purpose	Cost
New Venture Creation EPS160	“Process of starting a new venture including evaluating specific business opportunities identifying financing alternatives and defining start-up issues.”	>\$200
New Venture Law and Finance ESP161	“Introduction to the principles of legalization and capitalization of a new business venture. Includes the processes required to organize, register, finance, launch and protect a business”.	>\$200
New Venture Feasibility Analysis ESP165	“Introduction to the industry's market and competitive structure. Includes the technical skills to develop a competitive strategy for entry into the business segment. Covers the market potential evaluation, niche identification, analysis of competition, and development of customer profiles. Also involves the development of a marketing strategy and sales projections for new business ventures.”	>\$200
Technology Business Planning ESP180	“Fundamentals of identifying new technologies and innovations for profitable commercial feasibility. Determination of capabilities, resources, and interests of the entrepreneur. Evaluation and selection of technology opportunities. Creation of business concept and plan. Customer development and business models. Finances, venture capital and accounting. Marketing and sales. Legal formation and intellectual property. Operations and resource management. Growth, harvest and success.”	>\$300