

Sierra 2023 Blueprint for Growth

Sierra Corporate Strategy

  [2021 - 2025 Strategy Project Folder](#)

 [Corporate Strategy](#)

- Private (<https://app.clickup.com/20426925/docs/kfc5d-2901/kfc5d-9345>)
 - You don't have access to this Doc
 - Private (<https://app.clickup.com/20426925/docs/kfc5d-2901/kfc5d-12905>)
 - Private (<https://app.clickup.com/20426925/docs/kfc5d-2901/kfc5d-9365>)
-

? The Big Questions

Global Objective

Flexibly and profitably grow our business in Q4 2022 and 2023 with heightened uncertainty and market instability.

Underlying Questions

- How much time and what percentage are we spending managing clients vs. looking for new ones and working on Winback?
 - What marketing can we do to effectively drive new leads
 - Distributors
 - OEMs
 - Tier 1s
 - Independent Sales Reps
 - What funds should be allocated to
 - Marketing
 - Training
 - Talent Acquisition/Outsourcing
-

Themes

1- Execution

We are not effectively executing against our strategy.

- Why and what can we do about it?

2 - Productivity

Our productivity is sub-optimal (language, computer, educational skills). Resources are being misused or underused and human capital lacks in key areas.

- Why and what can we do about it ?

3 - Growth

The company continues to see anemic or non-growth.

- Why and what can we do about it?



Brainstorm

- Leads and Prospecting Company Person



Notes

- Where are we using our time
- What distributors resources or books?
- Sales vs. Customer Service
- Market Researcher
- Specialty Blogs like Reddit

☐ Create database for alternative products

☐ Create Marketing Space in Clickup

Trade Shows and Networking

☐ Research 2023 Shows

☐ Document Networking Shows

Lead Generation/Market Research

- Companies
-

Additional Marketing Materials

- Mini Landing Pages
 - Distributors
 - Banners (Digital Strategy)
 - Social Media
-

Marketing

- WhatsApp Statuses
 - Keyword Marketing
 - Magazines and Trade Publications
 - Billboards
 - Email Campaigns
 - LinkedIn
 - Blogs
 - YouTube Channel with Mike Carbide King
-

Independent Sales Reps

Summary

- Mike thinks Sales Reps are better than distributor.
 - Find them.
 - Train them
 - Marketing Materials
 - Commission Structure
 - Labor Contract
 - Payment Scheme
 - Reporting Portal
 - Minimum Targets

Regions

- North
 - QRO
 - Mexico City
-

Direct Distributors

Manufacturing Reps
Manufacturing Distributors

Where is time being spent on what and for whom?

- ☐ Do a time tracking analysis of the past 2 weeks

How much time are we spending on prospecting?

- 1/4 of time prospecting

How much time do we spend delivering parts.

- 1/4 - 1/5 of time is in deliveries

Quality

- 60% in Quality
 - Low Level Activity: 20%
 - Higher Level 40%
- Rolando is cleaning parts
- ☐ Come up with categories
 - ☐ Dany
 - ☐ Isaac
 - ☐ Ulises
- ☐ Measure time reactivity for 2 weeks and proactively for weeks 41 and 42

Marketing

- How much money are we currently spending on marketing > \$0
 - 10k on materials in October

200k in FCF per month 10-20% FCF > Marketing

- Leads
- Close existing deals

Distributors - 4% currently in distributor Sales

ISR % of Business = %0

Region

- 95% of business in the Bajío
- USA or Canada No Business

Plan of Action

Focus!

- Constant Prospecting
- Winback
- Churn Management
- Resale
- JV

Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-13265>)

-
- Being Different
 - Share the Wealth Incentives
 - Strategic Hires
 - Duolingo Language Courses

Human Capital Investment

- Skills Identification, Assessment and Buildout 204548449 (<https://app.clickup.com/20426925/v/li/204548449/114535124>)
- Employee Report Cards
- Marketing Materials
 - English version of 1 pager

- Improved Pitch Decks
- Marketing Initiatives
 - Increase Marketing Spend
 - Keyword
 - LinkedIn
 - Mailing List

Regrind and Resell Model
Laser Marker

☐ Make this a regular meeting every 15 days

Project Overview



Objective

To sustainably, profitably and flexibly grow and diversify Sierra and related companies revenues.



Desired End Result

- Grow Revenue to 25MDP per year
- Diversify business



Resources

Plan Components

Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-13145>)

Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-13065>)

Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-13265>)

Phases

Phase 1 - Taking Stock

Part 1



Goals:

- Free up existing resources.
- To correctly allocate those resources where needed.
- Increase the skillset of the current employees.
- What financial resources do we have

- Where are people's time being used
 - Private (<https://app.clickup.com/t/3k6pfm2>)

 ~~Create 1:1 Dashboards~~

Skills Audit

- Employees would self identify their skills in the 204548449 (<https://app.clickup.com/20426925/v/li/204548449/114535124>)
- Determine what skills/personnel are needed to execute the plan
- Skills gap analysis
- Training

Creating Systems to Correctly Measure Output and Follow-Up

Getting Some Cheap Help

- Interns
- Marketing

Key Client Visits Every 3/6 months.

Part 2

Phase 2 - Assemble Plan of Action

Phase 3 - Execute

- Training new grinders.
-

Unstructured Action Items

- ☐ Private (<https://app.clickup.com/t/3k6pfm2>)
-  ~~Organize into sections the~~ — Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-12245>)
- ☐ Investigate and Build out an Independent Rep Sales Channel (Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-13165>))
- ☐ Create an 211677776 (<https://app.clickup.com/20426925/v/li/211677776/121557061>) that can be used to input products that we may be able to sell that help diversify our offerings and increase our business (recommendation from @Isaac Angles Leon)
- ☐ Determine what budgetary allocation we can safely make (x% of FCF)
- ☐ Create a 114449044 (<https://app.clickup.com/20426925/v/f/114449044/55561705>) that better reflects our needs along with correct reporting in a or various Dashboard(s)

- ☐ Find marketing companies in CDMX that can serve our needs on an ongoing basis.
- ☐ Build out retail channel
 - ☐ Develop additional Private (<https://app.clickup.com/20426925/docs/kfc5d-2901/kfc5d-9105>)Casos

de Exito Plug and Play PDF ☐

- ☐ 204300914 (<https://app.clickup.com/20426925/v/li/204300914/114485745>)
- ☐ Private (<https://app.clickup.com/t/3m8z15t>)

Indirect Sales Reps

¿Qué es un representante de ventas independiente? - Spiegato

<https://spiegato.com/es/que-es-un-representante-de-ventas-independiente>

Nuevos trabajos de Representante ventas independiente - 10 de octubre, 2022 | [Indeed.com](#)

<https://mx.indeed.com/Empleos-de-Representante-ventas-independiente>

Ventrabajo Empresas

https://www.ventrabajo.com/empresas/index?gclid=Cj0KCQjwhY-aBhCUARIsALNIC076Opv0xB_I_IahRSK-BH1S6cecHvkRJTQDL6WemUQUkb9TYGtr64aAm78EALw_wcB

Manufacturer's Representative - Entrepreneur Small Business Encyclopedia

<https://www.entrepreneur.com/encyclopedia/manufacturers-representative>

Independent Sales Reps, Commission-only sales reps, Manufacturers Representative Jobs

<https://www.rephunter.net/>

Association of Independent Manufacturers Representatives, Inc.

<https://www.aimr.net/>

Joint Ventures

204300872 (<https://app.clickup.com/20426925/v/li/204300872/114486891>)

Product and Service Diversification

- //How can we identify growth markets? What tools are available.
- Standard Inserts
- Wheels
- Number Stampers?
- Blanks
- Punches and Stamping

Market Intelligence

Potential New Product Lines

Industrial Paper Cutting

<https://www.papercutters.com/resources/article/industrial-paper-cutter-knives-care-guide-save-money>

Industrial Knives/Cuchillos Industriales

Blades by Industry
Paper Cutting Blades
Food Processing Knives
Plastic Cutting Knives
Packaging Blades
Poultry & Meat Processing Knives
Rubber & Tire Cutting Blades
Industrial Razor Blades
Surgical Blades & Medical Knives
Metalworking Knives
Leather Cutting Knives
Woodworking Blades
Corrugated Cardboard Knives
Textile Blades & Non-Woven Knives
Film Slitting & Foil Conversion Blades
Granulator Knives and Screens
Recycling Blades
Seafood Processing Blades
Fresh Produce, Vegetable & Fruit Processing Blades
Cheese Processing Blades
Bakery Processing Blades
Custom Industrial Blades
Converting Knives
Tissue Knives & Log Saw

Industrial knives are essential cutting tools widely used in numerous industries such as metalworking, woodworking, packaging, and food processing. These knives are designed to cut, slice, chop, or shred different materials such as metal, wood, paper, and food products. They are typically made of high-speed steel, carbide, or other hard materials that can withstand high temperatures and pressures, ensuring their durability and longevity.

Industrial knives come in different shapes and sizes, depending on the type of material they are intended to cut, as well as the specific application and industry. For instance, circular knives are commonly used in the food industry to cut meat, poultry, and vegetables, while straight knives are typically used in the paper industry to cut sheets of paper or cardboard.

Some of the major global suppliers of industrial knives include Sandvik AB, Kennametal Inc., and Stanley Black & Decker Inc. These companies offer a wide range of industrial knives and cutting tools for different applications and industries. They also provide additional services such as sharpening, repair, and maintenance of industrial knives to ensure their optimal performance and longevity.

The quality and performance of industrial knives can greatly impact the efficiency and productivity of manufacturing processes. For example, dull or damaged knives can lead to uneven cuts, slower processing

times, and decreased product quality. Therefore, it is essential to use high-quality industrial knives and maintain them regularly to ensure consistent and reliable performance.

In conclusion, industrial knives are an integral part of modern manufacturing processes, and their applications are diverse and widespread across various industries. Whether it is metalworking, woodworking, packaging, or food processing, industrial knives are essential tools that help increase efficiency and productivity while maintaining product quality. As such, it is vital for manufacturers to select the appropriate type of industrial knife for their specific application and industry, as well as ensure that they are well-maintained and replaced as needed.

<https://americanquicksilverco.com/>

<http://caknife.com/> > <https://www.baucor.com/>

- <https://adek.com.mx/>

- <http://afiaf.blogspot.com/2013/09/afilado-de-cuchillas.html>

- <https://www.afiladosindustriales.mx/productos-y-servicios>

<https://grupocume.com/#contacto>

https://grinder.zjmrcm.com/?gclid=Cj0KCQiAm5ycBhCXARIsAPldzoWzVlgWjwcPzSD3VKkrx41_aabv4HuON8vvSaNmW2WXjjcug9jjDWoaApwkEALw_wcB

<https://www.thebladespecialist.com/sharpening>

<http://www.sahamit.co.th/index.php/en/products/machinery-and-equipment-for-wood-processing/toyo-knife>

Medical, etc

<https://www.cadenceinc.com/products>

WL-20 Electrodes

WL-20 electrodes are tungsten electrodes that are commonly used in TIG welding applications. They are designed to withstand high temperatures and pressures, making them ideal for welding various metals such as aluminum, stainless steel, and copper alloys. These electrodes are widely used in industries such as aerospace, automotive, and metalworking.

Some of the major manufacturers of WL-20 electrodes include Diamond Ground Products, Colfax, and Weldcraft. These companies offer a range of tungsten electrodes and welding accessories for different applications and industries. They also provide additional services such as technical support, training, and custom orders to meet specific customer needs.

WL-20 electrodes are a type of tungsten electrode commonly used in TIG welding for welding aluminum, stainless steel, and copper alloys. They are highly durable and can withstand high temperatures and pressures, making them ideal for use in industries such as aerospace, automotive, and metalworking. Some of the major manufacturers of WL-20 electrodes include Diamond Ground Products, Colfax, and Weldcraft. These companies

offer a variety of tungsten electrodes and welding accessories, as well as additional services such as technical support, training, and custom orders to meet the specific needs of their customers.

Broach

A broach is a cutting tool used in machining operations to produce precision holes or shapes in a workpiece. It is typically used to produce keyways, splines, or other complex shapes that cannot be easily produced by other cutting tools. Broaches come in various shapes and sizes, and are often used in the aerospace, automotive, and medical industries.

Some of the major manufacturers of broaches include Ohio Broach & Machine Co., Pioneer Broach Co., and Broach Masters Inc. These companies offer a wide range of broaches and cutting tools for different applications and industries. They also provide additional services such as sharpening, repair, and maintenance of broaches to ensure their optimal performance and longevity.

Digital Marketing

Private (<https://app.clickup.com/20426925/v/c/kfc5d-6985>)

Digital Marketing Agencies

Keyword Search

204329988 (<https://app.clickup.com/20426925/v/li/204329988/114485745>)

Trade Publications

Mexico

[Revistas](#)

Modern Machine Shop Mexico

Modern Machine Shop México | La fuente de información líder del sector metalmecánico

Modern Machine Shop México cubre tecnologías de maquinado y mecanizado para los talleres metalmecánicos. Incluye máquinas-herramienta, herramientas de corte, software, y equipos de ...

 <https://www.mms-mexico.com/>

**Modern
Machine
Shop**

Directorio Automotriz

[Directorio Automotriz](#)

www.directorioautomotriz.com.mx

<https://www.directorioautomotriz.com.mx/>

México Industry

MexicoIndustry | Impulsamos a México en el Mundo

Mexico Industry es el medio informativo impreso y digital de la industria de la manufactura en general. Es una revista industrial con más de 23 años de ser el vínculo entre el sector industrial, l...

 <https://mexicoindustry.com/>



Revista Contacto Industrial

Inicio

 <https://revistacontactoindustrial.com/>

MiProveedorIndustrial.com

La manera más fácil de encontrar refacciones y suministros industriales. Haz tu compra en línea y recibe tus artículos directo en tus instalaciones.

 <https://miproveedorindustrial.com/>

USA

Cutting Tool Engineering

Cutting Tool Engineering

CTE is the industry's leading publication for finding manufacturers, distributors and machine shops serving metalworking and machining.

 <https://www.ctemag.com/>

Cutting Tools Zone

Cutting Tools Zone

[vc_row][vc_column][vc_single_image image="9108" img_size="full" alignment="center"]
[/vc_column][vc_row]

 <https://www.mtwmag.com/cuttingtools-zone/>

Modern Machine Shop

Modern Machine Shop | Metalworking's leading information resource

Modern Machine Shop is focused on all aspects of metalworking technology - Providing the new product technologies; process solutions; supplier listings; application videos; business ...

 <https://www.mmsonline.com/>



Production Machining | The Precision Machined Parts Industry's Leading Information R...

The online extension of Production Machining magazine and the most comprehensive Web site available for high volume precision machining professionals.

 https://www.productionmachining.com/?oly_enc_id=1027D7629790H7V



Business Intelligence



In this section, we will store information related to research we are doing on Industry, Business Lines and Competition.

Hopson Tools (Harrison)

- [CBN Catalog](#)
- [Tool Holders](#)
- [Threading Inserts](#)

Churn Management

Introductory Statement

Unfettered churn has and continues to be an unaddressed problem for the business. This document is the beginning of our efforts to identify and address those issues.

- Early Alert Systems
- Winback
- Client Relations Management
- Client Birthdays
- Dinners
- Open House
 - Reps
 - Top

Human Capital Investment

Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-13945>)

- Increasing Leads
- Outsource Non Core (Subject Matter Experts)
- Leveraging More with Less

University Outreach

? Could we create a University Feeder/Rep program like I did a Varsity Books? Is this a feasible idea?

 [University Outreach and Recruitment](#)

 **Universities**

<https://mextudia.com/en-tu-ciudad/universidades-en-queretaro/>

 University Outreach Email

docs.google.com

<https://docs.google.com/document/d/1XoVsnpVKxEnvdcPut-WUd0QQZeQ8jZtUng9korh8fuA/edit>

Tec de Monterrey (QRO)

Σ Summary Information

- Date: 11.10.22 9am - 10am
- Location: Prados del Tecnológico, 76158 Santiago de Querétaro, Qro.
- Attendees: Me, [Leticia del Alba Peguero Medina](mailto:leticia.peguero@tec.mx) (leticia.peguero@tec.mx) Centro de Vinculación y Desarrollo Profesional
- About the University:
 - <https://tec.mx/es/queretaro>
 - <https://www.linkedin.com/school/tecmonterrey/>
- Other Key People: [Alejandra Torres Fernández](mailto:atorresf@tec.mx) (atorresf@tec.mx)

Notes

Meeting Notes Captured

- Semester based system totaling 17 semesters that works something like this:

5 Weeks On	1 Week Off	5 Weeks On
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- SEM 15/16 the students will do one of the following
 - *Estancia Profesional (Immersion in a Company)*
 - Intercambio Internacional
 - Specialization
- Things that would need to be provided (my thoughts) to the student & University Requirements
 - *NDA (University To Provide)*
 - University Coordinator
 - *University Part time coordinator*
- Company Counterpart (aprox. 1 hour a week of their time)
- Open Periods
 - *February - June*
 - July - Break
 - *August - December*

- Closed Sem. Santa
- Retos en Los Aulas/Socio Formador
- *Project Submission and Company Requirements Needed*
 - Company Provided "SOW"
 - *Estimated Time Req. (Weeks)*
 - Specific Requirements
 - Dedicated Professor
- There are 3 types of Prácticas Profesionales
- Also Ferias de Carrera
- Potential to have Becas of Support (Líderes de Mañana)

Program Information

Te estoy agregando dos links, el primero es de la información en general de los programas de vinculación y ahí en el menú encontrarás un apartado para registrar los proyectos; el segundo son los documentos que se tienen que firmar para quedar oficialmente como Socio Formador. La idea es que vayamos firmándolos y tenerlos listos.

Se sugiere tener tus proyectos dados de alta antes del **16 de diciembre.:**

- [Socios Formadores](#)
 - [Documents for Retos en Aula](#)
 - Estancias Profesionales
- <https://sites.google.com/tec.mx/sociosformadorqro/p%C3%A1gina-principal>
- Documentos: <https://sites.google.com/tec.mx/sociosformadorqro/documentos>
- Adicional a ello requerimos RFC, INE (de quien firma) y comprobante de domicilio de la empresa.

✓ Action Items

 Private (<https://app.clickup.com/t/3tmme9d>)



UNAQ

Σ Summary Information

- Date: 11.10.22 10:00am - 11pm
- Location: Av. Pie de la Cuesta 2501, Nacional, 76148 Santiago de Querétaro, Qro. [Santiago de Querétaro, Querétaro](#),
- Attendees: [Lic. Edgar Rangel](#), [Lic. Pamela Flores](#)
- About the University <https://www.unaq.edu.mx/>, [Wikipedia](#)



Notes

- [UNAQ Triptico.pdf](#)
- University started as a JV between the State of QRO and Bombardier
- President of France Visited the Franco-Mexican Section
- 6 Undergrad Careers
 - *3 Types of Engineering*
 - [Ingeniería Aeronáutica en Manufactura \(IAM\)](#)
 - [Ingeniería en Diseño Mecánico Aeronáutico \(IDMA\)](#)
 - [Ingeniería en Electrónica y Control de Sistemas de Aeronaves \(IECSA\)](#)
- *3 Types of Technical* [TÉCNICO SUPERIOR UNIVERSITARIO \(TSU\)](#) (2 Year program)
 - [TSU en Mantenimiento Aeronáutico Área Aviónica \(TSUA\)](#)
 - [TSU en Manufactura Aeronáutica Área Maquinados de Precisión \(TSUF\)](#)
 - [TSU en Mantenimiento Aeronáutico Área Planeador y Motor \(TSUM\)](#)
- [POSGRADO](#)
 - [Maestría en Ingeniería Aeroespacial \(MIA\)](#)
 - [Especialidad en Valuación de Bienes Aeronáuticos](#)
 - [Proyectos de posgrado](#)

UTEQ

Σ Summary Information

- Date: 11.10.22 10:00am - 11pm
- Location: Av. Pie de la Cuesta 2501, Nacional, 76148 Santiago de Querétaro, Qro. [Santiago de Querétaro, Querétaro](#)
- Attendees: [Maestro Carlos de Echeverria Bucio](#), Director de integración y Extensión Universitaria, [norma.ronquillo@uteq.edu.mx](#), [lelopez@uteq.edu.mx](#), Elías Hernández Medellín <elias.hernandez@uteq.edu.mx>
- About the University
 - <http://www.uteq.edu.mx/>
 - [Wikipedia](#)
 - <https://www.linkedin.com/school/uteq/>



Notes

- Use the French lycée method of teaching
- Tec Superior - 2 años y 8 meses
- Open periods for recruitment with 4 months of Practicas Obligatorio
 - Enero
 - Mayo
 - Septiembre
- Bolsa de Trabajo is another option (young man was going to email me)
- 70% of students go into the automotive industry and 30% go into another

Resources

[FORMATO DE REGISTRO DE VACANTES UTEQ.xls](#) > Bolsa de trabajo.

✓ Action Items

- ☐ Create flyer for students and have corresponding social media post format so that it can be easily shared.
- ☐ Create profile of what you are looking to obtain. What profile/projects they would be working on.
- ☒ ~~Get contact for Bolsa de Trabajo process for UTEQ~~

Elías Hernández M.

Coordinador administrativo de Bolsa de Trabajo y Desempeño de Egresados.

Depto. de Desempeño de Egresados

Universidad Tecnológica de Querétaro

Tel. 2 09 61 00 Ext. 1180

Trade School Outreach

Conalep

[https://www.conalepslp.edu.mx/
Nomina Becarios CONALEP.xlsx](https://www.conalepslp.edu.mx/Nomina Becarios CONALEP.xlsx)

A los dos practicantes del Conalep se les depositara Semanalmente la cantidad de \$1000 en la cuenta:
0606616638 Banorte del Colegio de Educación Profesional Técnica del Estado de S.L.P.

"La Factura la emitirá el Conalep cada mes".

Los practicantes son:

-Juan Manuel Silva Díaz :

- Carrera: Maquinas y Herramientas 6to Semestre
- Inicio Practicas: Lunes 4 de Marzo

-Juan Ramon Saucedo Roche:

- Carrera: Maquinas y Herramientas 6to Semestre
- Inicio Practicas: Lunes 11 de Marzo

Buen día Ing. Pedro

Las carreras de Máquinas Herramienta y Productividad Industrial las tenemos en el Plantel Ing. Manuel Moreno Torres que está ubicado en la Zona Industrial.

El Lic. Felipe Colles Murga, responsable de Vinculación del Plantel, (a quien marco copia) con gusto se comunicará a la brevedad posible con José Hernández para ponerse de acuerdo y enviarle los candidatos.

Le comento que los alumnos están próximos a egresar en el presente mes, por lo que estamos a buen tiempo de comenzar los procesos de selección.

Saludos cordiales

Karen Macías Valadez Elías
Jefa de Proyecto de Promoción y Vinculación
CONALEP
8 11 91 01

karen.macias.043@slp.conalep.edu.mx

KAREN MACIAS VALADEZ <karen.macias.043@slp.conalep.edu.mx>

to: Pedro Colunga <pcolunga@sierramfg.mx>,
felipe colles murga <fcollesm@hotmail.com>
cc: Andrew Martin <amartin@sierramfg.mx>,
• Jose Guadalupe Hernann

-
- interesados en que los alumnos realicen sus prácticas por un periodo de un año, entonces también ofrecemos el programa "Semillero de Técnicos".
 -
 - Todos los alumnos cuentan con Seguro de salud para estudiantes que otorga el IMSS (seguro facultativo) y Seguro de Vida contra accidentes.
 -



En caso de contemplar ayuda económica para los alumnos y ésta se realice a través del plantel, el colegio entregará a la empresa un recibo deducible de impuestos.

Para finalizar le informo también que, con la intención de formalizar las acciones y compromisos de vinculación lo recomendable es firmar un Convenio de Colaboración. (el Colegio propondría un convenio para su revisión) Sin otro particular, quedo a tus órdenes para cualquier duda al respecto, enviándole un cordial saludo.

Develop Reporting and Tools Required for Success

Commissionista Database

Meeting Notes

Wednesday, December 14 2022



Open Projects

- 2023 Intern Program (<https://doc.clickup.com/d/h/kfc5d-16525/28d95e012f35175>)
- Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-15505>)
- Private (<https://app.clickup.com/t/3x1cpz3>)
- Private (<https://app.clickup.com/t/3vkhwra>)

Notes and Action Items

Action Items



Wednesday, November 30 2022

Attendees: Andrew, Shannon, Mike

Time: 11:00 - 12:00



Sales In Numbers



Project Updates

- [\[3mengnt\] Talent Acquisition](#)
 - [\[3wnx1ev\] Make Progress in Defining Vision 2023](#)
 - [\[3kcc2v3\] FIQSA](#)
 - [\[3wvn5b2\] Create Quote Intake Form](#)
 - [\[3tmk08e\] Look for old tool lists and quotes for ZF/TRW and Evercast](#)
 - [\[3waez1q\] FIQSA Evercast/ZF Insert](#)
 - [Intern Projects](#)
 - [Trade School Outreach](#)
 - [CONLEP](#)
 - [\[3x159ra\] Engineering and Practicante Onboarding and Training Schedule](#)
 - [\[3wnwv17\] Determine if/how to move forward with GWS as a Distributor re: Bombardier](#)
-

Conferences

- [Calendar](#)

Key Deals

Top 5 (Fill this in better with USG, IA, y SMM)

- [\[2w3a119\] Bombardier Aerospace Mexico](#)
 - [\[3kcc2v3\] FIQSA](#)
 - [\[3kxht44\] CNGA 433 Eaton Motus](#)
 - [\[3wg1drt\] Valeo Alternadores](#)
-



Notes and Action Items

Notes

Action Items

- Private (<https://app.clickup.com/t/3x1cpz3>)
-

Friday, October 28th 2022

Attendees: @Shannon Marie Martin @Andrew Michael, Mike

Agenda

1. 114449044 (<https://app.clickup.com/20426925/v/f/114449044/55561705>) Sales Funnel Review
2. Marketing Projects
 - a. Private (<https://app.clickup.com/t/3nb4h8k>)
 - i. Private (<https://app.clickup.com/20426925/docs/kfc5d-13265/kfc5d-13825>)Private (<https://app.clickup.com/t/3nb4h8q>)
 - ii. Private (<https://app.clickup.com/t/3m8z15t>)
 - b. 204329988 (<https://app.clickup.com/20426925/v/li/204329988/114485745>)
 - c. 204300616 (<https://app.clickup.com/20426925/v/li/204300616/114485745>)
 - d. November Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-13045>)Private (<https://app.clickup.com/t/3mmd74f>)
 - e. Private (<https://app.clickup.com/t/3q8t4nq>)
 - f. Private (<https://app.clickup.com/t/3mzuzvn>)

3. Site Visits/Tours

a.



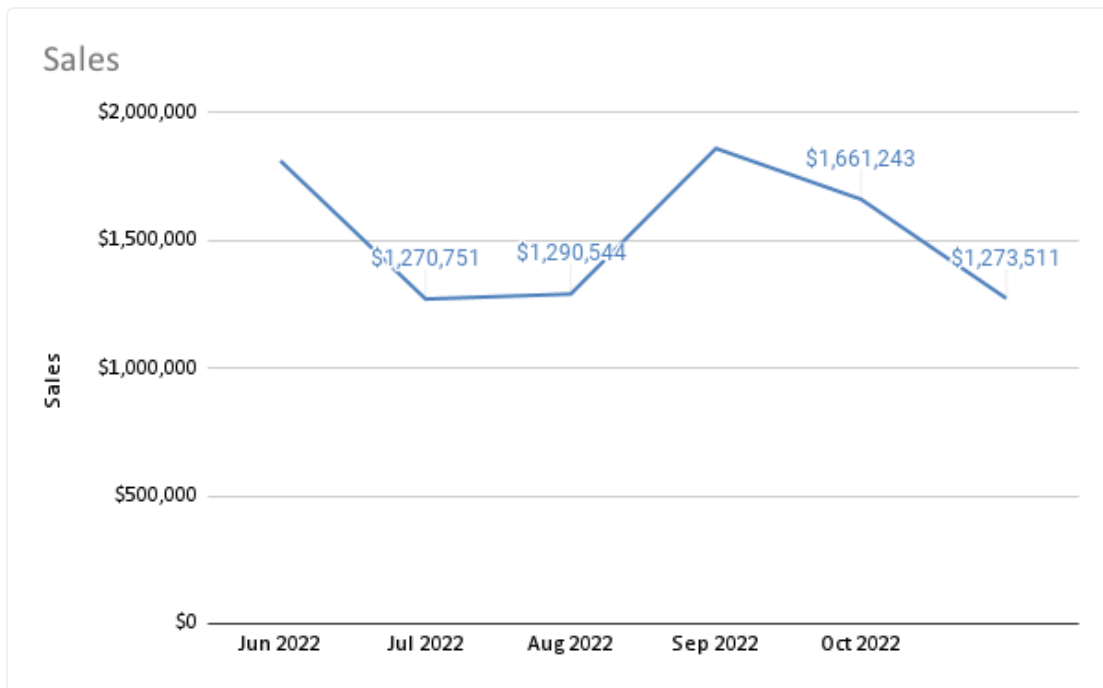
4. November Projects and Priorities

a.



b.





Action Items

- ☐ Private (<https://app.clickup.com/t/3qa7ehu>)@Andrew Michael
- ☐ @Shannon Marie Martin to work with @Ulises Nolacea and @Isaac Angles Leon to further Clean up the 210307255 (<https://app.clickup.com/20426925/v/li/210307255/114449044>) and 211599291 (<https://app.clickup.com/20426925/v/li/211599291/114449044>) lists
- ☐ Private (<https://app.clickup.com/t/3qa7gdj>)
- ☒ Private (<https://app.clickup.com/t/3qa7ekk>)@Andrew Michael
- ☒ Create Business Intelligence Section — Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-14185>)
- ☒ Give Mike Olaf's Number @Andrew Michael

Wednesday, November 2nd 2022

Attendees: @Shannon Marie Martin @Andrew Michael, Mike

Agenda

- 1. Review Action Items from Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-14745>)
- 2. Review Sales Funnel and Next Actions Private (<https://app.clickup.com/20426925/v/gr/kfc5d-9605>)
- 3. Feedback for Private (<https://app.clickup.com/t/3qa7ehu>) (DRAFT)
- 4. Priority Projects
 - a.
 - b. Private (<https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-13045>)
 - i. Private (<https://app.clickup.com/t/3mmd74f>)
 - ii. Private (<https://app.clickup.com/t/3q8t4nq>)
 - iii. Private (<https://app.clickup.com/t/3mzuzvn>)
- 5. Marketing Projects
 - i. Private (<https://app.clickup.com/t/3nb4h8k>)
 - ii. Private (<https://app.clickup.com/20426925/docs/kfc5d-13265/kfc5d-13825>)
 - iii. Private (<https://app.clickup.com/t/3nb4h8q>)
 - iv. Private (<https://app.clickup.com/t/3m8z15t>)
 - v. 204329988 (<https://app.clickup.com/20426925/v/li/204329988/114485745>)
 - vi. 204300616 (<https://app.clickup.com/20426925/v/li/204300616/114485745>)

Sales Numbers

	January 2022	February 2022	March 2022	April 2022	May 2022	June 2022	July 2022	August 2022	September 2022	October 2022
Invoiced	\$358,211	\$634,310	\$1,085,844	\$1,041,115	\$1,561,842	\$1,095,475	\$1,112,538	\$1,603,776	\$1,433,106	\$1,295,262
Sales	\$317,785	\$1,931,027	\$1,325,378	\$1,089,140	\$1,707,529	\$1,472,708	\$1,051,382	\$2,009,882	\$471,812	\$2,514,907



Notes

- How can Mike find Old quotes > Google Drive or Odoo
 - 2019 and beyond Odoo
 - Before 2019 Google Drive

💡 Work with @Isaac Angles Leon and @Shannon Marie Martin.

- Step 1 is to reallocate current resource before deploying new ones.

✓ Action Items

- ☐ Private (<https://app.clickup.com/t/3qa21je>) - Shannon to work in on determining where time is actually being spent.
- ☐ Private (<https://app.clickup.com/t/3r0xmmd>)

Friday, November 17 2022

✓ Action Items

- Private (<https://app.clickup.com/t/3vkhwra>)

Reporting

Next Steps

Opportunities and Tests

Private (<https://app.clickup.com/20426925/v/gr/kfc5d-9605>)

Networking Events

💡 Here is where we will document and organize regular and one time networking events that can further our Growth.

211789881 (<https://app.clickup.com/20426925/v/li/211789881/121556548>)

Trade Shows

Private (<https://app.clickup.com/20426925/docs/kfc5d-2901/kfc5d-13025>)

211676824 (<https://app.clickup.com/20426925/v/li/211676824/121556548>)



Expos and Trade Shows

☐ @Andrew Michael Add the Region For All of these and any missing relevant fields like Industry, etc.



Listing Sites

Cluster Industrial

Cluster Industrial - Los eventos más relevantes para la industria automotriz

Puedes conocer las fechas de los eventos a realizarse en el sector automotriz, así como registrarte para asistir a ellos y enlazar negocios.

<https://www.clusterindustrial.com.mx/eventos>

Conferencias en CDMX

Conferencias en Ciudad de México | Eventbrite

Descubre las mejores conferencias en Ciudad de México. ¡Visita Eventbrite.com.mx y compra los boletos para tu próxima conferencia en Ciudad de México antes de que se agoten!

<https://www.eventbrite.com.mx/d/mexico--mexico-city/conferences/>

Somos Industria

Expos | Somos Industria

Lista de las proximas exposiciones de la industria en México

<https://www.somosindustria.com/expos/>

Ferias industriales en Mexico

Ferias industriales en Mexico

Ferias industriales en Mexico. Calendario de Ferias industriales en las principales ciudades de Mexico

 <https://www.nferias.com/ferias-industriales/mexico/>

Exposiciones | MexicoIndustry

Exposiciones | MexicoIndustry

Entérate de las próximas exposiciones sobre industria en México u otros países.

 <https://mexicoindustry.com/expos>



Programa de Conferencias - Industrial Transformation Mexico

Programa de Conferencias - Industrial Transformation Mexico

 <https://industrialtransformation.mx/programa-de-conferencias-2/>

Exposiciones y Ferias

 <https://www.dirind.com/exposiciones.html>

AIM destacará la V9 en la feria SMTA de Guadalajara

Cranston, Rhode Island EE.UU. – AIM Solder, fabricante líder mundial de materiales de ensamblaje de soldadura para la industria electrónica, se complace en anunciar su participación en la próxima

 <https://aimsolder.com//es/news/aim-destacara-la-v9-en-la-feria-smta-de-guadalajara>

Trade Publications

Mexico

[Revistas](#)

Modern Machine Shop Mexico

Modern Machine Shop México | La fuente de información líder del sector metalmecánico

Modern Machine Shop México cubre tecnologías de maquinado y mecanizado para los talleres metalmecánicos. Incluye máquinas-herramienta, herramientas de corte, software, y equipos de ...

 <https://www.mms-mexico.com/>

**Modern
Machine
Shop**

Directorio Automotriz

[Directorio Automotriz](#)

www.directorioautomotriz.com.mx

<https://www.directorioautomotriz.com.mx/>

México Industry

MexicoIndustry | Impulsamos a México en el Mundo

Mexico Industry es el medio informativo impreso y digital de la industria de la manufactura en general. Es una revista industrial con más de 23 años de ser el vínculo entre el sector industrial, l...

 <https://mexicoindustry.com/>



Revista Contacto Industrial

Inicio

 <https://revistacontactoindustrial.com/>

USA

Cutting Tool Engineering

Cutting Tool Engineering

CTE is the industry's leading publication for finding manufacturers, distributors and machine shops serving metalworking and machining.

 <https://www.ctemag.com/>

Cutting Tools Zone

Cutting Tools Zone

[vc_row][vc_column][vc_single_image image="9108" img_size="full" alignment="center"]

[/vc_column][/vc_row]

 <https://www.mtwmag.com/cuttingtools-zone/>

Modern Machine Shop

Modern Machine Shop | Metalworking's leading information resource

Modern Machine Shop is focused on all aspects of metalworking technology - Providing the new product technologies; process solutions; supplier listings; application videos; business ...

 <https://www.mmsonline.com/>



Metrics and Reporting

- You don't have access to this Doc
-  [Executive Financial and Operational Metrics](#)
-  [2022 KPIs](#)

Lead Generation Companies

Marketing Agencies



Here is a list of the Marketing Agencies we are using or may use.

Lluvia de Ideas

In this section, team-members can put their ideas down in an unstructured way to be discussed and incorporated during our Private (<https://app.clickup.com/t/2t2um8z>) sessions.

Playbooks and Briefs

Private (<https://app.clickup.com/20426925/docs/kfc5d-2901/kfc5d-1081>)

Prospecting Lead Generation Brief (<https://doc.clickup.com/d/h/kfc5d-4745/0d6ce4178696a4a/kfc5d-5545>)

Business Directories

[Directorio Empresas San Luis Potosí.pdf](#)

Focus: Highly Leveraged Activities

What would you do with this freed up time?

High-leverage activities: how to identify your energy multipliers

We all have an absolute limit on time, but high-leverage activities are energy multiplier. Reclaim your time and energy by identifying your best levers.

 <https://nesslabs.com/high-leverage-activities>


DOCUMENT
time and energy
allocation


HIGHLIGHT
best not
levers


SELECT
high-leverage
activities

WhoNotHow by Dan Sullivan and Dr. Benjamin Hardy

What if everything you did was your choice, including how you spend your time, how much money you make, with whom you have relationships, and only doing work that aligns with your purpose?

 <https://whonothow.com/>



Determining Our Hows

 Highly Leveraged Activities <i>THESE ARE THINGS WE SHOULD FOCUS ON</i>	 Low Level Activities THESE ARE THINGS WE SHOULD MINIMIZE OR OUTSOURCE
• Writing Marketing Copy • Testing • Sales Calls • Merchandising • Social Media Marketing • Going to Conferences • Doing site visits with key clients • Industry and other networking events • Prospecting	• Deliveries • Invoicing/Purchasing • Helpdesk review and response • Credit Card Statement Reconciliation • Factura Downloads • Supplies management, ie cleaning supplies, tp, etc. • Report generation • Party Planning • Baby Sitting



Determining our Who's

VAs

New Positions

Practicantes



Automation



Resources



Intern Projects

Intern Projects

Note:

- Could work in rotating groups of projects
- Have one leader
- Have a buddy.

Project	Sponsor(s)	Intern
Private (https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-15785)	• @Alberto Aguilar • @Isaac Angles Leon • @Shannon Marie Martin	
Private (https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-15945)	• @Alberto Aguilar • @Ulises Nolacea	
Private (https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-15825)	• @Andrew Michael • @Daniel Contreras Muñoz • @Alberto Aguilar	
Private (https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-15865)	• @Andrew Michael • @Shannon Marie Martin	
Private (https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-15885)	• @Isaac Angles Leon	
Private (https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-15905)	• @Isaac Angles Leon	
You don't have access to this Doc	• @Shannon Marie Martin • @Ulises Nolacea	
Private (https://app.clickup.com/20426925/docs/kfc5d-5705/kfc5d-15925)	• @Shannon Marie Martin	

IoT Implantation

IoT Hardware | Odoo

 <https://www.odoo.com/app/iot-hardware>

- Measuring Instruments
- Bar Codes
 - Inventory
 - Manufacturing



Guide



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PROJECT

What's the most crucial project you'd like to work on this quarter so you can communicate or delegate it successfully?



PURPOSE

What do you want to accomplish? Describe the goal you're aiming for. This is crucial information for others on your team to understand so they can align with your vision.

!! IMPORTANCE

What is the biggest difference this will make? Why is this so important? Describe the impact this will have in detail so you and others can fully grasp its significance.



IDEAL OUTCOME

What does the completed project look like? Paint a picture of what it should look like when it's done.



BEST RESULT

What's the best that will happen if you take action on this project? Thinking about a positive result will inspire and energize you.



WORST RESULT

What's the worst that will happen if you don't take action on this project? Seeing the impact of inaction is a great motivator for you to move forward.



SUCCESS CRITERIA

What has to be true when this project is finished? What are the criteria for success? In other words, how will you and your team know that it worked? Give specifics so each criterion is measurable and can be judged in the end as successful or not.



The Impact Filter

PROJECT/FOCUS			
PURPOSE	- What do you want to accomplish? - What is your motivation?	SUCCESS CRITERIA	What specific result must be true for this project to be a success?
		1	
		2	
		3	
IMPORTANCE	- What is the difference this will make? - What impact this will have?	4	
		5	
IDEAL OUTCOME	- What does the completed project look like? - What is the payoff?	6	
		7	

		8
SELLING YOURSELF		
BEST RESULT What's possible if you do take action.		
WORST RESULT What's at risk if you don't take action.		
Date:	Name:	

Forecasting, Analysis and Projections

https://www.causal.app/?utm_medium=email&_hsmi=229835216&_hsenc=p2ANqtz-Lpz_f-xKJjH-RZpNpkxPTr9Td9nI9QAr9h49QIIWudQhyYe-x8R0F7JHs8Te98BNVNRINo_IBFcm6aiKjm4iadWYANA&utm_content=229835216&utm_source=hs_email

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eCommerce and Social Media



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Metrology

- Keyence plantillas
- Marmoles
- Measuring Instrument Calibration
- Metrology Focus
- 5S
- Training Platform/Manual
 - Engineering
 - Metrology
 - Machinist
 - Administration
 - Client Support/Sales Training

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5S & Ergonomic Work Areas

Production Lines



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Learning Modules and Knowledge Management

Private (<https://app.clickup.com/20426925/docs/kfc5d-2901/kfc5d-1081>)



Knowledge Management

- Materials

The #1 Learning Management System | Odoo

Odoo eLearning is an open source software designed to help create effective contents. With its metrics, Odoo also gives you an overview of everything you need!

 <https://www.odoo.com/app/elearning>

- Learning Library



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Google AppSheet

Client Management Application ([Appsheet](#))

- Client Stock
- Tool Life Management and Measurement
- Client Satisfaction
- Mejora Continua
- Client Services (Basic)
- AI <https://www.thomasnet.com/insights/the-9-industrial-apps-your-business-should-be-using/>



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