

MISSION  
TO MARGIN

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As a CEO, you may be facing tough decisions about how to maintain critical impact in the community with less resources as well as more challenging infrastructure needs. Our designated CFO level advisors could be just be the trusted partner you need to facilitate this.

One key place to being is to perform a mission-to-margin analysis. Why? This will align your leadership team and Board on priorities for the organization and where to make changes if necessary. This can be completed either in all day leadership strategy session or if that isn't possible, you can also send out some advance questions and then finish up the process with a video session for discussion. Here's how it works:

## A CEOs Guide to Mission to Margin Analysis

1. Ask your staff leadership, Board and other appropriate stake holders to rank each of your programs 1 to 5 on each of the following metrics.
  - a. How aligned each program is with your mission (1 not aligned at all or 5 fully reflective of the mission) If possible, provide metrics on impact for each program in advance.
  - b. The level of the margin (1 being a significant loss up to 5 showing a substantial surplus). Your CFO will need to prepare and submit margin data by program. Make sure the "margin analysis" incorporates all indirect costs.

2. Create a diagram with four quadrants as shown below:



3. Put each program in quadrant that aligns with its ranking
4. Look at the programs in the following sections and discuss why they are in these quadrants:
  - a. High Mission – High Margin: this is where you want your programs optimally – Can these programs be expanded? Why are they so high? How can you replicate this success?
  - b. Low Mission – Low Margin: any programs in this quadrant should be evaluated for action steps – possible closing or program adjustments
5. These discussions should engage everyone into aligning on the mission once again, determining the best road ahead in an accountable manner everyone can be engaged in and understand. This will lead to decisions that all stakeholders will get behind because even if they wanted something different, they will see where the decision came from and why it is necessary.

**We'd love to partner with you and provide your business with critical data for decision-making;** like this mission to margin exercise. Connect with us to hear more about how we could help you grow.

Quattro is a tech-enabled outsourcing firm that empowers clients to see further, scale smarter, and stand stronger. As a trusted transformational partner with a technology edge, we offer highly personal services and agile approaches across Finance & Accounting, and Technology Services.

With our **Get More To Go On** strategy, organizations can achieve higher operational effectiveness, greater flexibility, and lower costs. We are all about creating business excellence with impactful performances – every step of the way.