



# ***Commercial Projects and Organisation Change Activities***

***2009 - 2018***



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## Introduction

### Garry Steele - Projects / Organisation Change Activities

This document will provide the reader with a greater understanding of the comprehensive range of projects and organisational change activities that I have been involved with for a variety of organisations across both the private and public sectors. This document covers the period from 2009 onwards.

I have considerable experience at working with clients and key stakeholders - in reviewing the organisation's key goals and business objectives - and then introducing organisational change by bringing a strong innovative and entrepreneurial approach to assess the organisation's goals and objectives, profile and market, financial situation, current products and services, resources and skills – together with their overall operational capability, whilst also reviewing new potential business ideas and opportunities.

The key to any business success is assessing each situation on an individual basis in order to comprehensively assess, research and analyse the:

- Market Opportunity and Business Strategy
- Market Size and Revenue Potential
- Product Development Strategy
- Project and Programme Planning
- Financial Strategy and Risk
- Competition Research and Analysis
- Delivery and Service Strategy
- Resource Capability
- Overall Risk Assessment

All of the above goes into developing a strategic Business Plan which provides key decision makers with all the information they will need to be able to comprehensively assess each and every opportunity, assess the realistic potential and finally, assess the risk.

All of this is required so that, with all the facts available, the organisation is then able to make sound judgements and take the right decisions.

The following pages detail some of the projects that I have personally worked on with the following organisations:

- |                        |  |
|------------------------|--|
| • Bristol City Council | • Southend Borough Council                   |
| • E.ON UK Plc          | • Somerset County Council                    |
| • The Coal Authority   | • London Borough of Hammersmith & Fulham     |
| • Bomar Offshore Ltd.  | • Federation of Leaders in Special Education |

If you need any further clarity, please email me.

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## Bristol City Council

Bristol City Council are investigating new ways to increase the council's income through commercial means and are looking to generate a more commercial attitude and increase awareness of the need for staff to consider commercial opportunities.



The 'Commercialisation and Innovation Working Group' (CIWG) have identified key areas that require further scoping of the commercial proposals and assessing the feasibility and deliverability.

This will include harnessing the good practice that exists and embracing new and alternative ways of doing things to ultimately deliver successful, meaningful and controlled change and transformation projects and programmes.

### Projects / Commercial Activities

- Shape and manage commercialisation/ income generation projects
- Develop key business strategies and business case development
- Produce full strategic business cases in line with BCC governance processes

### Key Deliverables

- Defined a Commercial Business Strategy that encompasses:
  - Understanding our markets
  - Finding new customers
  - Establishing our niches
  - Developing our 'Value Propositions'
  - Developing our USP's
  - Developing the brand
  - Developing project plans, implementing programme and 'change' strategies
- Implemented a Commercial Business Model that defines how revenue can be generated by trading economically, successfully and profitably. This fundamentally addresses the three core strands of **skills, accountability and transparency** and defines a business process that **maximises opportunities and minimises risk**.
- Established a business framework to implement a 'Market Opportunity – Assessment' document and spreadsheet to conduct detailed evaluation of target projects and business opportunities – which included:
  - Drivers
  - Barriers
  - Options
  - Strategic Planning
  - Marketing Strategy
  - Marketing Plan

## E.ON UK Plc

E.ON UK is an English energy company and a subsidiary of the German company E.ON, the world's largest investor-owned power and gas company. It was founded in 1989 as Powergen and was listed on the London Stock Exchange and was once a constituent of the FTSE 100 Index. It has been a subsidiary of E.ON since 1 July 2002.



It was formerly a vertically integrated utility company with interests in electrical generation, electricity distribution in the Midlands region, and in the electricity and gas supply markets. However, since restructuring and sales, E.ON UK is now a retail business with support functions.

As Interim Commercial Manager for E.ON UK, my focus within their Finance & Commercial team was to support their fast-growing business area and play a key role in delivering their vision for Business and Community Solutions which are at the heart of delivering E.ON's vision - which is to improve people's lives and become their energy solutions partner of choice - where customers are looking to improve profitability, secure their energy supply, reduce complexity and improve their comfort and well-being.

### Projects / Commercial Activities

- Helping to build E.ON's solutions capability in the UK, driving robust commercial decisions to shape the strategy for new and existing propositions.
- Working closely with the Product Development domains at a group level and the UK 'Go to Market' team.
- Establishing the commercial business case for the UK market, supporting the business to determine the market opportunity and influence key pricing decisions.
- Working closely with the Sales team to shape customer proposals, identifying customer's needs and preparing bundled commercial offers to strengthen E.ON's position as the solution partner of choice.

E.ON utilise a very detailed and comprehensive financial model for their storage energy solutions. One of my key tasks was to commercialise this model so that it would be more robust for Key Account Managers and Sales Engineers to evaluate and produce comprehensive business propositions for customers who were looking to capitalise on energy storage and thereby reduce their energy costs, particularly at times of peak usage / peak cost.

This (and other models) were used to produce B2B business propositions for all prospective customers including key multi-million pound bids.

### Key Deliverable

- Established a framework to commercialise their very comprehensive financial modelling tool that is utilised by the business for all B2B client evaluations and business propositions. Implemented Phase 1 of a classic Management Information and User Guide tool for the model (together with all relevant documentation) to enable Key Account Managers and Technical Sales Engineers to have a clear understanding of the objectives of the model, its mechanics and its inputs and outputs.

## The Coal Authority



The Coal Authority's strategy is to innovate and expand their range of commercial products and consultancy services to local authorities, infrastructure providers, developers, landowners, homebuyers, and other organisations in both the public and private sectors.

As Head of Business Development (Interim), my role was to establish and develop a commercial business strategy for the company, whilst promoting a commercially astute culture across the organisation, working collaboratively with other teams and helping to drive the organisation's vision of becoming a world leader in resolving the impacts from the legacy of mining.

### Projects / Commercial Activities

<ul style="list-style-type: none"> <li>• <b>Strategic Planning</b> <ul style="list-style-type: none"> <li>• Organisation Structure and Planning</li> <li>• Operational Planning</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Technology / Systems</b> <ul style="list-style-type: none"> <li>• Website</li> <li>• Email Marketing</li> <li>• Pipeline Management / Forecasting / Planning Systems</li> <li>• CRM</li> <li>• Management Reporting</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Business Development</b> <ul style="list-style-type: none"> <li>• Business Process</li> <li>• Product Development Strategy</li> <li>• Marketing Strategy <ul style="list-style-type: none"> <li>▪ Value Proposition</li> <li>▪ External Marketing</li> <li>▪ Website</li> <li>▪ Market Research &amp; Analysis</li> <li>▪ Sizing &amp; Evaluation</li> </ul> </li> <li>• Business Planning</li> <li>• Sales Strategy / Account Planning</li> <li>• Sales Forecasting / Reporting / CRM</li> <li>• Deployment / Project Implementation Services / Customer Services</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Commercial Business Strategy</b> <ul style="list-style-type: none"> <li>• Marketing and Sales Strategy</li> <li>• Product Development Strategy</li> <li>• Commercial Infrastructure Planning</li> <li>• Strategic Business Planning methodology</li> <li>• Business Project reporting and accounting methodology</li> <li>• New technologies to enable all the above.</li> <li>• Ownership / Accountability / Visibility</li> <li>• Marketing and Sales operations and alternative delivery vehicles</li> </ul> </li> </ul>

### Key Tasks

- Develop a Commercial Business Marketing and Sales Strategy for the organisation.
- Establish a new Commercial Infrastructure within the Coal Authority to deliver the above.
- Implement a Strategic Business Planning methodology.
- Implement a Business Project reporting and accounting methodology.
- Assess all sales & marketing operations and alternative delivery vehicles - to streamline operations, develop more effective resource utilisation, and deliver profitable growth.

### Key Achievements / Deliverables

- Delivered a detailed Strategic Commercial Business Strategy for the organisation - including: Strategic Business Plan, Product Development Strategy, Marketing Strategy, Marketing Plan and detailed Account Planning Strategy incorporating Forecasting and CRM – to increase exposure across market sectors, grow their market share, increase their customer base, achieve financial targets and improve profitability.

## **Bomar Offshore Ltd.**

Bomar Offshore Ltd provides a specialised service and solutions to the offshore Oil & Gas Industry. The service they provide covers full detailed offshore surveys of all fire doors, windows and enclosures.

They supply, install and carry out a maintenance service that ensures new and existing doors, windows and enclosures stay within the certification requirements specified by the original manufacturer.



My brief was to establish and develop a dedicated Commercial Business Strategy for the organisation as they looked to diversify a number of their product and service offerings, help them to identify new market sectors to approach, streamline their manufacturing, business and delivery operations.

Then, utilising a range of new marketing and networking activities, this would help them to enhance their abilities and seek out new business opportunities across a wider market sector.

### **Projects / Commercial Activities**

- **Commercial Business Strategy**
  - Market Assessment
  - Market Opportunity
  - Market Potential
  - Competitor Analysis
  - Risk Analysis
  - Product / Services Development Strategy
  - Product Marketing Strategy
  - Resource Analysis
  - Marketing and Sales Strategy
  - Business Project reporting and accounting methodology
  - New technologies to enable all the above.
  - Ownership / Accountability / Visibility
  - Marketing / Sales / Delivery operations

### **Key Tasks**

- Develop a Commercial Business Strategy for the organisation.
- Establish a new marketing, business planning, sales, project management and reporting methodology.
- Assess and implement new technologies to enable all the above.

### **Key Achievements / Deliverables**

- Established and delivered a range of business development services to Bomar as they looked to diversify their business operations and required help to oversee the 'stepping up' of their business development requirements and how they could better commercialise certain aspects of the business, explore new markets and streamline existing operations.

## Southend Borough Council



My initial brief at Southend Borough Council (SBC) was to commercialise their Internet Telephony offering and turn this into a marketable and saleable product and service through a trading company.

Other projects quickly followed (with a brief to assess transformational change, commercial strategy, potential business opportunities, business plans, alternative delivery models and RISK) - and these are identified below.

### Projects / Commercial Activities

- **Adult Social Care**
  - Involved with project to assess opportunities across:
    - Care Homes
    - Youth Services
- **Alternative Delivery Models (ADMs)**
  - Project to assess the following different deliver models to be able to assess the optimum model for delivering each service / product. These included:
    - Local Authority Trading Companies (LATC)
    - Social Enterprises
    - Mutuels
    - Joint Venture
    - Co-Opt
- **Building Control**
  - Assessed 'Joint Venture' options with other Local Authorities across Essex to see how services could be better 'joined' and services delivered.
- **Business Hubs**
  - Developed project to assess the viability and best (or alternative) usage, and therefore opportunities for revenue generation) of physical assets owned by the authority.
- **Catering**
  - Developed a 'Catering Services Project' Business Case and Commercial Proposition:
  - Included the Civic Centre, Tickfield Centre, Pier and several additional 'off site' facilities across the Borough.
  - Assessed schools catering requirements across council's-maintained schools.
  - Identified, qualified and evaluated initial potential catering vendors for new 7-year catering contract.
  - Worked with Procurement to clarify, assess and draw up ITT's to be sent out to shortlisted catering vendors.
  - Oversaw the project and a key member of the evaluation team to review and finally select new catering vendor.
- **Catering**
  - Oversaw the full implementation and delivery of the project.
  - Increased T/O and revenue by 20%



## Southend Borough Council (Cont...)



- **Community Equipment Supplies**
  - Set up and ran a project to assess commercial viability of Southend Independent Living (LATC), and how this could be expanded to increase revenue.
  - Conducted detailed research and evaluation and made recommendations through detailed Business Case.
  - Halted a proposed Internet company project - saving some £250K.
- **Contract Management / Negotiation**
  - Oversaw contract negotiation and Management thereof of the Catering project.
  - Negotiated an annual guaranteed minimum of £54K revenue return to council over the 7-year contract term
- **Corporate Venues**
  - Initiated project to review all council owned physical assets across the Borough with the objective of assessing better asset utilisation and revenue generation opportunities. These assets included the:
    - Pier
    - Historic Buildings
    - Libraries
    - Museums
  - Civic Centre
    - Council Chamber
    - Business Meeting Rooms
  - Weddings / Business Meetings / Social events
  - Forecast to increase revenue by £500K to £1m by 2020 with 25% net profit
- **Crematoria and Cemeteries**
  - Project to assess revenue generating opportunities by introducing new service opportunities – which included:
    - Guest Meeting areas
    - Café facilities
- **Digital Strategy**
  - Project to assess the potential for a comprehensive Digital Strategy across Southend. This was to include:
    - Corporate Vision / Planned Outcomes
    - Current Projects
    - Ownership / Responsibilities
    - Business Transformation – internally across Council / Externally
    - Business Transformation Architecture
- **Education Services**
  - Worked within the department to review and recommend on-line services – Southend Learning Network
    - [www.southendlearningnetwork.co.uk](http://www.southendlearningnetwork.co.uk)
  - 50+ services available
  - Available for Maintained and Non-Maintained Schools

## Southend Borough Council (Cont...)



- **Grounds Maintenance**
  - Developed project to assess future GM operation to reduce costs and increase revenue
  - Detailed evaluation of: In-house / Shared Services / Joint Venture options
- **Leisure & Culture**
  - Involved with project to assess future viability of delivering leisure & culture services to maximise revenue opportunities:
    - In-house / Outsourced services
- **Shared Services**
  - Assess multiple ventures for shared service assessment
- **South Essex Homes (ALMO)**
  - Worked with South Essex Homes to assess options for generating revenue
  - Atilius (LATC)
    - Specialist property services
- **Telephony / Telecoms Infrastructure**
  - Southend Trading Corporation (LATC)
  - Introduced marketing strategy, commercial business processes and operational strategy to get Telephony solution productised and into the market
  - Detailed contract negotiation with customers and 3<sup>rd</sup> party suppliers including Vodafone – these included formal commercial contracts, SLA's, NDA's etc.
  - Increased telephony sales by 20% in Year 1
    - Sales to multiple schools and Brentwood Council
  - Mothballed Trading company in Year 2 due to change in market conditions
    - Rising costs and flat sales
    - Competition too strong
    - Made decision to 'Get out' before losses incurred

## Somerset County Council

I worked with Somerset County Council (SCC) on developing and delivering learning on Marketing Skills in the Public Sector.



My insight into business and marketing across multiple industries in the private sector allowed me to translate this into practical solutions for managers in the public sector - and make the process simple, concise and relevant in today's public-sector environment.

I provided SCC with a toolkit that provided them with the means to apply well-rehearsed processes to previously alien ways of working for some.

As councils and other public bodies find themselves having to trade in the services they provide, marketing and sales processes are becoming far more commonplace at County and Town Halls across the UK – thus requiring a need for better focus and knowledge in this area.

### Projects / Commercial Activities

<ul style="list-style-type: none"> <li>Marketing Services in the Public Sector</li> </ul>	<ul style="list-style-type: none"> <li>Commercial Awareness</li> </ul>
<ul style="list-style-type: none"> <li>Strategy Planning</li> </ul>	<ul style="list-style-type: none"> <li>Commercial Business Strategy <ul style="list-style-type: none"> <li>Business Process Modelling</li> <li>Market Research</li> <li>Business Planning</li> <li>Marketing and Sales</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>Innovation and Change <ul style="list-style-type: none"> <li>People and Communication</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Digital Strategy</li> </ul>
<ul style="list-style-type: none"> <li>Product Development Strategy</li> </ul>	<ul style="list-style-type: none"> <li>Customer Service Strategy</li> </ul>
<ul style="list-style-type: none"> <li>Alternative Delivery Models</li> </ul>	<ul style="list-style-type: none"> <li>Target Operating Models</li> </ul>

### Key Tasks & Activities

- These included reviewing and assessing: Innovation and Change; Commercial Business Strategy; Product Development Strategy; Marketing, Sales & Customer Service Strategy; ADM's; Digital Strategy and New Ways of Working.

### Key Achievements / Deliverables

- Presented and demonstrated both the theory and the practicality of bringing products and services to a commercial market and all the processes that needed to be undertaken to ensure that they have the best chance of success.
- Delivered a comprehensive 'Commercial Business Strategy' to the organisation.

## London Borough of Hammersmith & Fulham



My role at Hammersmith and Fulham (LBHF) was to work with the Innovation & Change Management (ICM) Division to commercialise the products and services that ICM had created and develop a package of marketable solutions. My brief also included assessing all the resources and their skill sets within the Division and turning this into marketable assets and opportunities.

The areas covered included:

### Projects / Commercial Activities

<ul style="list-style-type: none"> <li>• <b>Activity Road Mapping / Consultant Service Portfolio</b> <ul style="list-style-type: none"> <li>○ Business Intelligence</li> <li>○ Business Process Re-engineering</li> <li>○ Change Support</li> <li>○ Client Indexing</li> <li>○ Customer Program Management</li> <li>○ Customer Journey Mapping</li> <li>○ Data Use Evaluation</li> <li>○ Leadership &amp; Management</li> <li>○ LEAN Thinking</li> <li>○ Portfolio Management</li> <li>○ Program/Project Management</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Business Planning &amp; Commercial Activities</b> <ul style="list-style-type: none"> <li>○ Assessing commercial marketable products and services</li> <li>○ Business Case Planning <ul style="list-style-type: none"> <li>▪ Business Strategy &amp; Analysis</li> <li>▪ Business Commercial Planning</li> <li>▪ Marketing Strategy</li> <li>▪ Product Development</li> <li>▪ Professional Services</li> <li>▪ Sales Strategy</li> <li>▪ SWOT Analysis</li> <li>▪ Target Operating Models (TOM)</li> </ul> </li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Product Road Mapping</b> <ul style="list-style-type: none"> <li>○ Product Definition</li> <li>○ Market Research</li> <li>○ Competitor Analysis</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Marketing Literature</b> <ul style="list-style-type: none"> <li>○ Design and Development</li> <li>○ Product Definition</li> <li>○ Market Research</li> <li>○ Competitor Analysis</li> <li>○ Client Analysis</li> <li>○ Market Assessment</li> </ul> </li> </ul>

### Key Tasks

- Conducted 1-2-1 reviews with the ICM team, clarified current working practices, developed comprehensive series of Business 'Activity Roadmaps' which covered Business Intelligence, Business Process Re-engineering, Change Support, Customer Journey Mapping, Data Use Evaluation, Program/Project Management, Leadership & Management. Established a comprehensive Business Service Portfolio and productised the same.

### Key Achievements / Deliverables

- Produced a detailed Business Case for the creation of a Trading Company for ICM. Included Business Analysis, SWOT Analysis, Business Planning, Development, Professional Services, Marketing, Sales and Support. Developed a Year 1 (2015/16) Target Operating Model (TOM) that outlined the structure in preparation for delivering income targets.

## Federation of Leaders in Special Education



My brief at the Federation of Leaders in Special Education (FLSE) was to lead the future direction of the Federation and put the organisation onto a stable business footing by developing and implementing a realistic and achievable strategic planning, business development and commercial strategy that would address Special Education Needs and Disabilities (SEND) in the education sector.

This included developing a corporate communications strategy between special schools, local authority bodies and central government - and acting as a 'conduit' between all three.

I developed, co-ordinated and implemented all aspects of the business including strategic direction, business development, communications, sales and marketing, membership registration, finance, personnel and administration and an e-commerce strategy.

### Projects / Commercial Activities

<ul style="list-style-type: none"> <li>• <b>Strategic Planning and Development</b> <ul style="list-style-type: none"> <li>○ Organisation Structure and Planning</li> <li>○ Operational Planning</li> <li>○ Communications strategy</li> <li>○ Marketing strategy</li> <li>○ Sales strategy</li> <li>○ IT strategy</li> <li>○ Online strategy</li> <li>○ Networking strategy</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Membership Strategy</b> <ul style="list-style-type: none"> <li>○ On-line member registration system <ul style="list-style-type: none"> <li>▪ Email</li> <li>▪ Newsletters</li> <li>▪ Forum</li> </ul> </li> </ul> </li> <li>• <b>Event Management</b> <ul style="list-style-type: none"> <li>○ Regional Marketing/Training Seminars</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• <b>Relationship Management</b> <ul style="list-style-type: none"> <li>○ Special Schools</li> <li>○ Department for Education</li> <li>○ Local Authorities</li> <li>○ Professional Bodies</li> <li>○ Professional Associations</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>E-Commerce Strategy</b> <ul style="list-style-type: none"> <li>○ New website</li> <li>○ Finance</li> <li>○ Products</li> <li>○ Reporting</li> </ul> </li> </ul>

### Key Tasks

- Led the future direction of the Federation, and put the organisation onto a sound business footing by developing and implementing a realistic and achievable strategic business development strategy.

### Key Achievements / Deliverables

- Developed, co-ordinated and implemented all aspects of the business including: strategic direction; business development; membership database; communications; sales and marketing; membership registration; finance; personnel and administration; e-commerce strategy. Delivered a strategic solution that ensured closer ties between the FLSE, members and the DfE, local authorities and other educational professional bodies and associations, plus:
  - Directed 9 individual regions across England.
  - Gained membership from 35% of all special schools.
  - Leveraged current members to significantly increase overall new member take up of 10% through networking and 'peer to peer' communication.
  - Revised fee structures, resulting in a 10% revenue increase and reduced operating costs by 15%.