

ENPRO 357 SUMMER 2003
Business Planning & Strategy Development Module
Latin American Chamber of Commerce Team
Project Work Plan

Team Members:

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The purpose of the Latin American Chamber of Commerce (LACC) Team is to help LACC develop their vision using the Strategic Management Systems (SMS) software. By concentrating on the four different perspectives of the Balanced Score Card: Financial, Learning and Growth, Internal Business Process and Customer, we can develop a solid and reliable strategy map for the organization. In addition, we hope to get creative feedback about the SMS software which will significantly help improve the software. With the improvements, the SMS software can be more effective when the next version is created.

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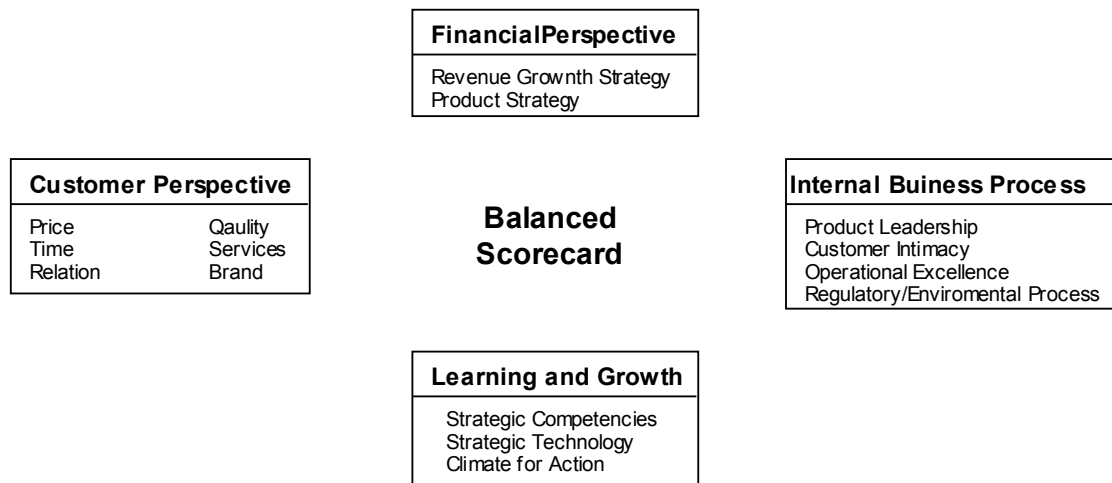
1. INTRODUCTION

The Strategic Management System Software was developed as a technology commercialization system used to create situation analysis, business strategies, and operational feasibility analysis. The software encompasses several key ideas beginning with the Balanced Scorecard and using several ideas presented by Professor Kalidonus. Our module, Product Development and Business Modeling will work with several organizations and the SMS software.

1.1 *Balanced Scorecard*

The traditional approach towards management separates the strategic development from its implementation. This method fails during the execution phase, as finances are focused upon and the strategy is forgotten through poor communication. The organizations also measures performance through these financial metrics, leading them to often forget the customer and look solely at profits.

In recognition of this problem, Drs. Robert S. Kaplan and David P. Norton of the Harvard Business School developed the balanced scorecard (BSC) in 1992. This framework supplements the financial aspect of an organization with the customer, internal business process, and learning and growth perspectives. The metrics produced along side the finances expanded the view of managers so that the organization's strategy could be better served and initiatives could be created to improve all four measures.



With the success of the balanced scorecard, it was soon realized that it had the potential to be far more than simply a measurement system. With the introduction of the strategy map in 1997, the BSC model was expanded to help in strategic development. A strategy map has four specific themes: strategic analysis (build the franchise), strategic planning (increase customer value), operation (achieve operational excellence), and support strategy (be a good citizen). Through the development of the strategy map, Kaplan and Norton later articulated five key principles required for building a strategy-focused organization. The first is to translate the strategy into operational terms, and then secondly to align the organization to the strategy. The next two steps are to make the strategy everyone's job and to make strategic development a continual process. Finally, the organization must mobilize change through strong, effective leadership.

The balanced scorecard has proven to be a groundbreaking step for strategic management through numerous successes. In the corporate world, companies such as Mobil, AT&T, Fannie Mae, and Nova Scotia Power have all make rapid improvements after utilizing the BSC framework. Likewise, non-profit organizations such as the city of Charlotte in North Carolina, U.C. San Diego, and federal agencies have reduced costs and improved public satisfaction.

1.2 Strategic Management System Software (SMS)

As the balanced scorecard developed into a useful means of describing strategy, it became evident that the model could become a framework for implementing and managing strategy. This realization led to the marriage of an enhanced BSC model that includes a vision and mission perspective, and the Kalidonis process. The outcome was the development of the Strategic Management System (SMS), now on its third major release. The new version also includes an innovative market analysis scorecard to help in the development and revision of a market study.

Under the guidance of Professor David Pistrui, a faculty member at IIT's Stuart Graduate School of Business, the Strategic Management System has been utilized both in and out of the classroom. At IIT's MBA program and engineering college, versions of the SMS software has been used to teach business skills and methodologies. He has also used the system successfully with over a dozen small, family-owned businesses in Europe and the Chicagoland area.

1.3 Module Overview

This module originally consisted of two teams. One team was to work with the Latin American Chamber of Commerce, while the other with LBL Strategies and their Mappware product. Due to difficulties that arose between the IPRO 357 and LBL Strategies, this module now only consists of the Latin American Chamber of Commerce team. The focus of this module is on activities related to research, analysis, marketing, planning, organizational design, budgeting, along with user studies and beta testing. The LACC team will build a relationship with the LACC and use the Strategic Management System to develop a strategy map. Through the knowledge obtained via the strategy map and through observation of the LACC, the team shall present a Strategic Assessment report analyzing LACC and their strategy. Also through the knowledge obtained, the team will create an Applied Business Revenue model for LACC which may assist them in developing their strategy and operation procedures.

1.4 Minority Business Overview in Illinois

Minority and Woman Owned Businesses in Illinois

Group	All firms		Firms with paid employees			
	Firms (number)	Sales and Receipts (\$1,000)	Firms (number)	Sales and Receipts (\$1,000)	Employees	Payroll (\$1,000)
Universe (All Firms)	882,053	993,116,732	240,024	965,260,429	4,994,344	155,799,469
Total minorities	110,340	23,997,470	23,687	21,602,327	191,442	4,724,731
Black	41,244	3,913,240	3,747	3,253,027	35,034	787,773
Hispanic	31,010	4,814,853	6,320	4,173,772	71,692	1,551,678
Cuban	1,341	293,940	275	278,030	1,723	50,143

Mexican Mexican American, Chicano	15,584	2,471,682	3,996	2,169,958	44,012	698,027
Puerto Rican	2,636	203,897	407	146,958	1,704	37,483
Spaniard	1,014	210,537	153	186,778	1,571	40,803
Hispanic Latin American	5,274	1,180,151	1,098	1,018,359	19,550	632,471
Other Spanish/Hispanic/Latino	5,162	454,646	393	373,690	3,133	92,751
American Indian and Alaska Natives	3,945	664,108	650	570,584	4,879	137,517
Asian and Pacific Islander	36,857	14,727,553	13,205	13,679,250	80,589	2,262,178
Asian Indian	10,967	3,929,883	4,363	3,558,181	26,477	792,349
Chinese	6,005	5,154,597	3,102	5,022,152	20,909	530,582
Filipino	4,219	552,097	594	467,525	3,192	106,647
Japanese	1,867	1,835,961	713	1,801,234	6,455	185,690
Korean	7,946	1,714,358	3,187	1,454,048	13,568	255,282
Vietnamese	1,412	117,903	228	D 500 to 999		D
Other Asian	3,877	1,375,929	977	1,263,136	8,991	366,859
Hawaiian	458	D	30	D 0 to 19		D
Other Pacific Islander	107	D	12	D 250 to 499		D
Women	239,725	44,273,464	39,584	40,125,169	392,569	9,044,388

D Withheld to avoid disclosure; N Not available; S Withheld because data do not meet publication standards;

Source: [1997 Economic Census: Minority- and Women-Owned Business Enterprises](#)

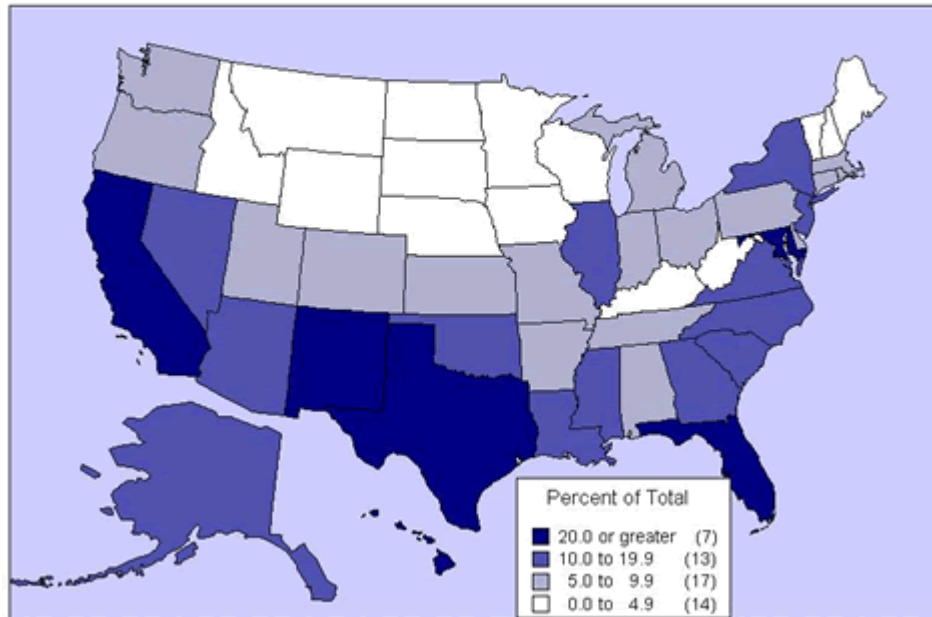
Minority and Woman Owned Businesses in Chicago IL

Group	All firms		Firms with paid employees			
	Firms (number)	Sales and Receipts (\$1,000)	Firms (number)	Sales and Receipts (\$1,000)	Employees	Payroll (\$1,000)
Universe (All Firms)	176,605	212,939,424	47,756	206,409,580	1,110,656	40,836,164
Total minorities	47,091	7,941,284	9,003	7,081,779	68,808	1,536,158
Black	23,576	2,452,633	2,186	2,071,103	24,815	570,686
Hispanic	12,602	1,818,658	2,743	1,578,168	19,450	304,188
American Indian and Alaska Natives	537	48,973	40	29,703	227	9,017
Asian and Pacific Islander	11,576	3,672,772	4,149	3,426,770	24,476	656,897
Women	47,720	8,923,772	7,302	8,041,507	79,475	2,207,457

D Withheld to avoid disclosure; N Not available; S Withheld because data do not meet publication standards;

Source: [1997 Economic Census: Minority- and Women-Owned Business Enterprises](#)

Minority-Owned Firms as a Percent of Total Firms in State: 1997



Source: U.S. Census Bureau

2. OBJECTIVES, MILESTONES & EXPECTED RESULTS

2.1 General Research Question

- Can the Strategic Management System be implemented and used with the Latin American Chamber of Commerce to produce an effective strategy map and provide the LACC with a solid strategy solution upon which they can restructure the organization?

2.2 Specific Research Question

- Can the Strategic Management System be used to create a comprehensive strategy assessment report?
- Can the Strategic Management System along be used to in a successfully in a revenue model?
- Can the Strategic Management System be used to aid non-profit organizations?

2.3 Objectives

- Work with LACC consulting staff and the SMS software to create a detailed strategy map and assessment report.
- Work with LACC consulting staff to develop an applied business revenue model for the SMS software in the not-for-profit chambers of commerce consulting context.
- Work with LACC consulting staff to produce a strategic assessment & development report.

2.4 Secondary Objectives

- Receive feedback from LACC regarding the SMS software.
- Develop raw data that can be later used in the creation of a case study.

2.5 Deliverables

- Team Project Work Plan due by Thursday June 19, 2003
- Midterm Progress Report & Oral Presentation by Thursday June 26, 2003
- Final Project Report and presentation consisting of: strategy map, strategic assessment report, applied business revenue model, and development report due by July 23, 2003

2.6 Assumptions

- The LACC is lacking a strategy
- The LACC employees will cooperate during the interview process
- The LACC will benefit from the increased communication and understanding of the organization.

3. TEAM OVERVIEW

The Latin American Chamber of Commerce team consists of four members: Jose Apolinar, Yan Bolotin, Raul Cancino, and Benjamin Manes. These members will be working with their client, the Latin American Chamber of Commerce and the Strategy Management Software system to complete the teams stated objectives.

3.1 Latin American Chamber of Commerce (LACC)

The LACC was founded in 1976 by eighteen small businesses in an effort to provide minority business assistance to the small businesses in the community. Since then the LACC has grown to offer many services to anyone seeking assistance. Currently they offer the following services:

- Business Financing: Writing loan packages and obtaining financing for its clients
- Contract Procurement: Preparing MBE/WBE certification packages and assisting companies in obtaining contracts with government agencies and prime contractors
- General Business Consulting: Assisting clients in all aspects of business development from writing business plans to formulating marketing strategies.
- Management Development: Providing specialized training to upgrade the expertise of business management.

Today the LACC operates under four government contracts. Each contract provides funding to the LACC for the services that they offer for their clients. The contracts are as follows:

- US Department of Commerce – Established Chicago Minority Business Development Center
- City of Chicago Department of Planning and Development (DPD)
- Illinois Department of Commerce and Community Affairs (DCCA) - Small Business Development Center
- Minority Business Opportunity Committee (MBOC)

3.1.1 Latin American Chamber of Commerce Board Members

The board of directors consists of the following members:

CHAIR

D. Lorenzo Padron – President LatiAmer General Corporation

CO-CHAIR

Antonio Guillen - Senior Vice President, Commercial Loan Department, Cosmopolitan Bank and Trust

TREASURER

Bennett Santana – President, Business Systems of America

SECRETARY

Gabriel Hostalet – President, Kingston Plastic Co.

Frank Kross – President, Labe Federal Bank

Claudio Montoya - Business Development Officer, Banco Popular

Hans W. Bonner - Senior Vice President, Latin American Chamber of Commerce

Preston Harris, Jr. – President, Boaz Fine Carpentry, Inc.

Margarita Morales - Financial Control Manager, A Lakin General Corp

T. Frank Sasco – President, Re/Max Casablanca

Maria Santiago - Assistant Vice President, LaSalle Bank

3.1.2 Latin American Chamber of Commerce Employees

The LACC currently employs the following people:

Hans W. Bonner – Senior Procurement Consultant, Project Director

Julieta Oliveros – Business Consultant

Gregory I. Bula – Business Consultant

Dwain K. Speese – Financial Consultant

Omar Elmusa – Financial Consultant

Terrance Wordlaw – Marketing Consultant

Carlos A. Bernal – Vice President, Chief Financial Officer

Marcial Garibay – Marketing Analyst

Josephine Ocampo – MBE/WBE Certifications Specialist

Jennifer Wittman – Business Consultant

Carlos Malano - Financial Consultant

3.2 Mission

The Latin American Chamber of Commerce has been fragmented and disorganized for the last several years. With several managerial changes and new employees, the organization is having difficulty developing a strategy and improving their business. We seek to help the LACC develop a strategy, and in so doing provide important data in their efforts to restructure and build the LACC into a superior competitor in its markets.

3.3 Vision

Our vision is to work with LACC and the six elements of the SMS software to develop a strategy for the LACC and improve their business operations. Also to provide a rewarding work and learning environment to the members of the project as well as meet our objectives and goals: to create a strategy map, strategic assessment report, and an applied revenue model. Upon

completing our mission, we hope that our input will help restructure the LACC, thus, helping the organization prosper in the near future.

3.4 Team Leadership

It was agreed upon that the idea of casting members into positions such as team leader, spokesperson, and secretary did not make a difference in the performance of its members. In fact, it simply provided titles for bragging rights and tension within the group. For such a small team with a clear and obtainable objective, a democratic model was chosen instead. In this model, the team members will discuss any issues in dispute and if a decision cannot be made Professor Pistrucci will be sought for guidance and a final decision.

This choice was made for the following reasons. This is largely because originally the workgroup was part of larger module, where a captain was chosen for both workgroups and the module. However, a module captain turned out not to be needed due to the distinctly different focuses and that with such small workgroups the leader only made sure people began the processes of working. It soon became evident that each member was more than willing to work and push each other and thus a leader was in title only. With the dissolving of the sister workgroup (LBL Strategies), the workgroup and module became one. This decision safely calmed fears of tension arising over a title, showed the trust and commitment that the members have for each other, and allowed for focusing on the set objectives. The team will rely upon prodding each other, evenly dispersing the load and learning experience, and a high level of communication.

The team regularly discusses over group email, instant messaging, phone, and face-to-face meetings. The integration of the most recent team member has been flawless and the tasks have naturally been subdivided, with members stepping up to take on deliverables. The democratic structure lends well to a four-man group.

3.5 Team Members Background Information

Jose Apolinar

Jose Apolinar is currently a senior at the Illinois Institute of Technology. He will receive his bachelors in Computer Science this coming fall. He has job experience in the areas of networking and customer service. He was involved in a computer equipment migration at CNA insurance for one year. He was responsible for setting up new machines, replacing servers and providing technical support to the users. He is taking this ENPRO to gain general business experience. His other goal is to extend his communication skills by working with the Latin American Chamber of Commerce.

Yan Bolotin

Yan Bolotin is a junior at the Illinois Institute of Technology and will be graduating in Spring 2004 with a Bachelors in Computer Science. Over the last several years he has held several jobs in many markets such as sales, car sales, network management, web design, construction, and

currently owns and operates a cellular phone distribution and wholesale company. The purpose of taking this ENPRO course is to attain more knowledge of business operations and gain experience working with companies in different markets.

Raul Cancino

Raul Cancino-Alvarez was born in Guanajuato, Mexico. He attended the University of Guanajuato and majored in Chemical Engineering. He worked for nine years in the textile industry as a QA Technician. For the last nine months he has been working at Vegetable juices, Inc. as a QA Inspector. Currently, Raul is enrolled at Illinois Institute of Technology and he is majoring in Engineering Management. He is taking this ENPRO to gain experience in the management field.

Ben Manes

Ben Manes is an undergraduate student at the Illinois Institute of Technology pursuing a Bachelors in Computer Engineering and a Bachelors in Computer Science. He will graduate in December of 2003 and earn a Masters in Computer Engineering in May of 2004 from IIT's graduate school. He is also a brother of the Armour Chapter of Triangle, where he holds the position of Internal Chair. In the Spring of 2003, he worked with the first ENPRO team in developing the business plan for the Strategic Management System. His interests include software design, aspect-oriented programming, microprocessor architecture, project management, and strategic management. He is taking this ENPRO to skills at networking and strategic development.

3.6 Contact Information

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Phone [REDACTED]

4. ACTIVITY SCHEDULE AND KEY DATES

4.1 Activity Schedule

Date	Activities	Outputs & Deliverables	Responsible Group Members	Expected time of task	Actual Time
6/11/03	Meet with Dwain Speese	Get background on LACC and schedule next meeting	All	2 hours	
6/13/03	Meet with LACC and begin interviews of employees (interviews unknown) (All team members, 9am at LACC offices)	Begin to answer questions from the SMS software	All	4 hours	
6/13/03	Schedule next meeting with LACC to continue interviewing employees Complete project work plan	Completed project work plan due	YB, JA	1 hour	
6/15/03	Meet at 3pm to gather information from interviews and begin working with SMS	Begin to answer questions in SMS	RC	2 hours	
6/16/03	Receive project work plans back and work on second revision in class	Complete rewrite of project work plans due 6/19/03	YB, JA	2 hours	
6/17/03	Second meeting with LACC 9am (Jose & Yan) 3pm (Raul) 12pm (Jose & Yan) Contract Overview with Carlos Bernal	Complete first interviews with employees	All	5 hours total for both groups	
6/18/03	Meet at 10pm to complete revision of Project work plan	Completed Project work plan due 6/19/03		1 hour	
6/19/03	Submit Revised Project Work Plan				
6/23/03	Work on midterm progress reports Conduct Research on BSC for non profit	Draft written report and presentation	All YB	3 hours	
6/24/03	Meet with Dwain Speese to work on Applied Business Revenue Model	Begin Revenue Model Report	All	2 hours	
6/25/03	Finalize Midterm Written Report Research Revenue Model	Reports due 6/27/03	YB, JA BM	3-7 hours	
6/26/03	Meet with LACC and conduct second interview of several employees 9am Jose and Yan 4pm Raul and Ben	Compile all interview data and complete SMS	All	4 hours	
6/27/03	Compile and finalize midterm report and project plan	Midterm Report and 3 rd revision of project plan	JA, BM, YB	5-7 hours	
Date	Activities	Outputs & Deliverables	Responsible Group Members	Expected time of task	

Project Work Plan

LACC TEAM - Business Planning & Strategy Development

6/29/2011

6/28/03	Strategy Map data entry and begin writing Assessment Report.	First draft of Strategy Map and Report	JA, BM	3-4 hours	
6/30/03	Review of Strategy Map data. Modify information.	1 st Revision of Strategy Map	JA, BM	1-2 hours	
7/2/03	Complete Applied Business Revenue Model 9am – Jose and Yan, meeting at LACC with all employees and Board to discuss issues	First draft of Revenue Model	JA, BM	3 hours	
7/7/03	Complete first Draft of Strategic Assessment Report and Begin Development Report	Complete first draft	All	4 hours	
7/9/03	Proof read First draft of Strategic Assessment Report	Second Draft of Strategic Assessment Report	YB	1 hour	
7/14/03	Proof Read Strategic Assessment Report by English Department and complete Development Report	Third Draft of Strategic Assessment Report First Draft of Development Report	JA	1-2 hours	
7/16/03	Work on Poster	Poster Due 7/23/03	All	3 hours	
7/21/03	Assemble completed Final Report	Final Report Due	YB	1 hour	
7/23/03	Submit Final Report, Web Page, Poster and Practice Presentation	Final Presentation	All		
7/24/03	I PRO DAY	Final Presentation and Poster	All		

Key: YB – Yan Bolotin, JA – Jose Apolinar, RC – Raul Cancino, BM – Ben Manes

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6. RESOURCES

Bonner, Hans W. *Project Director.* Chicago Minority Business Development Center.

Bernal, Carlos A. *Vice President, Chief Financial Officer.* Latin American Chamber of Commerce.

Bula, Gregory I. *Business Consultant.* Latin American Chamber of Commerce, Small Business Development Center.

Elmusa, Omar. *Financial Consultant.* Chicago Minority Business Development Center.

Malano, Carlos. *Financial Consultant.* Chicago Minority Business Development Center.

Ocampo, Josefine. *MBE/WBE Certification Specialist.* Chicago Minority Business Development Center.

Ronderos, Fernando. *Business Consultant.* Minority Business Opportunity Committee.

Speese, Dwain K. *Financial Consultant.* Chicago Minority Business Development Center.

Wittman, Jennifer. *Business Consultant.* LatiAmer General Corporation.

Wordlaw, Terrance. *Marketing Consultant.* Latin American Chamber of Commerce

Latin American Chamber of Commerce, <http://www.latinamericanchamberofcommerce.com>

IPRO 327 & 357: Planning for a Web Based Entrepreneurial Business,
<http://www.iit.edu/~ipro357s03/home.html>

Strategy Management System v 3.0, <http://www.stuart.iit.edu/faculty/kalidonis/smsv3.0/>

7. AGREEMENT

We, the members of the Latin American Chamber of Commerce Team, belonging to the Product Development & Business Modeling Module, agree to work as diligently as possible and equally distribute work among the group. We shall not place all work on one team member and shall work together to follow our objectives, our mission, our vision, to produce the deliverables by their due dates.

We hereby agree to the above terms and conditions

Yan Bolotin

Date _____

Jose Apolinar

Date _____

Raul Cancino

Date _____

Ben Manes

Date _____