

Lean budgeting – Step into the Agile Release Train

A second wave of the coronavirus (COVID-19) seems to be a matter of time. In the meantime, we are moving into a heavy recession. What is your view on the (near) future? Are you doing your homework? What is your structured approach to be(coming) future proof? Based on our experience, we share an introduction to lean budgeting. Please forget about a traditional planning cycle and step into the Agile Release Train.

Upstream Capital – *your dedicated partner to realize your full potential, driven by data analytics*

- 4 we accelerate growth and optimize operational expenses with continuous improvement
- 4 we believe in hands-on value creation and create strategic options throughout the business life cycle
- 4 we align business strategy with operations. We drive customer satisfaction and productivity; helping supply products and solutions of outstanding quality, cost efficiently with shorter delivery times

How we differentiate ourselves

- 4 unbiased and objective advice to the benefit of our clients
- 4 hands-on strategic and operational value added approach. We work on-site with our clients in order to accelerate sustainable growth and value creation together
- 4 unique combination of skills business development, business transformation, corporate finance, capital raising, data science, lean six sigma and performance improvement

Our Services

Business Planning

- 4 A company wants to design a business growth plan, with strategic roadmap how to accelerate sales with an efficient and effective expense base

Business Transformation

- 4 A company wants to maximize value and eliminate waste. Based on data analytics, a company aims to optimize the flow of people, equipment and cash

Corporate Finance

- 4 Raising Capital - a company is seeking either growth capital or acquisition financing
- 4 Recapitalization - a company may seek to recapitalize its ownership structure to attract external investors or take out existing shareholders
- 4 Restructuring – a company wants or needs to (re)negotiate to improve or reset its financing terms and conditions
- 4 M&A and Valuation - Shareholders (incl. PE portfolio companies) are considering to sell the company

Lean Budgeting – Step into the Agile Release Train

Based on our experience, we share an introduction to lean budgeting :

- 1) Lean budgeting is a method to organize your equipment, people and cash around value streams
- 2) The term value stream describes the set of steps from the start of value creation until the delivery of the value to the customer
- 3) Forget about a traditional planning cycle. This approach will result in less bureaucracy, delays and overhead as well as much higher throughput
- 4) Establish self-managing agile release trains (hereafter : "ART") to encourage the development of high performing, cross functional teams
- 5) The work process of an ART is as follows; define, build, test, deploy, release and operate
- 6) These teams start with the design of a value stream map; a flowchart with information about the workflow and eliminate waste
- 7) ART should deliver continuous improvement (10-12 week program cycles), driving customer value

Safety first! Stay healthy and take care of others

Contact us

In case you require support, please contact us

✉ info@upstreamcapital.nl

☎ +31 6 1518 4909

🌐 www.upstreamcapital.nl