VANGUARD STRATEGY PARTNERS

Focused Service Portfolio & Partner Engagement
Version 2.0 | Strategic Working Draft | October 19, 2026

1. Strategic Focus & Core Philosophy

Vanguard supports companies outside the educational sector in systematically aligning their goals, people, processes, and tools. Our focus is strictly on actionable, tangible results rather than vague consulting promises. For the initial market approach, Vanguard focuses on four core competencies and two clearly defined entry-level offerings.

> ***Core Principle:*** *First thoroughly understand the actual need and existing structure – then develop the appropriate organizational, personnel, or digital solution. A Microsoft 365 or SharePoint implementation is a potential measure, but never the predefined answer.*

2. Four Core Competencies

01 | Corporate Alignment & Performance

Translating strategy into clear, actionable goals, roles, metrics, and leadership routines.

- Aligning mission, vision, and corporate values with daily operations.
- Reviewing existing corporate and departmental structures, interfaces, and responsibilities.
- Developing company-, team-, and role-level KPIs (including clear definitions, data sources, target values, and ownership).
- Establishing regular review cadences, reporting structures, and action item tracking.

> 📦 **Concrete Deliverables:** Alignment and Goal Matrix, Organizational Chart, RACI / Responsibility Matrix, KPI Scorecard, Review Templates.

02 | People, Recruitment & Onboarding

Aligning personnel decisions with actual task requirements and competency needs.

- Analyzing staffing needs and operational capacities prior to new hires, factoring in process efficiency and automation potential.
- Creating target-group-oriented Job Descriptions and strategic Job Postings.
- Defining structured interview processes (Interview 1 and 2), selection criteria, evaluation matrices, and approval workflows.
- Introducing comprehensive onboarding checklists, training roadmaps, and 30/60/90-day performance reviews.

> 📦 **Concrete Deliverables:** Role and Competency Profiles, Job Description & Posting Blueprints, Interview Guides, Candidate Scorecards, Structured Onboarding Plans.

03 | Process Excellence & Corporate Standards

Simplifying workflows, unifying documentation, and establishing binding operational standards.

- Mapping and prioritizing legacy processes, approval paths, organizational roles, and handovers.
- Building practical Standard Operating Procedures (SOPs), company policies, and high-level process maps.
- Standardizing internal communication channels and document ownership models.
- Consistently embedding the existing Corporate Design into sales offers, letterheads, reports, presentations, and digital portals.

> 📦 **Concrete Deliverables:** Corporate Process Map, SOP & Policy Templates, Approval Matrix, CI-compliant Word and PowerPoint Masters, Document Governance Handbook.

04 | Information, Digital Workplace & Data Management

Structuring the corporate information landscape before deploying technical software solutions.

- **As-Is Assessment:** Evaluating existing platforms, file servers, local drives, cloud services, email silos, Excel trackers, and employee search behavior.
- **Business Processes & Information Flows:** Auditing where documentation is created, approved, shared, archived, and retrieved.
- **Data Quality & Migration:** Identifying duplicates, outdated records, retention needs, data cleanup strategies, ownership, and technical migration requirements.
- **Permissions & Security Architecture:** Defining roles, security groups, external collaboration baselines, and handling rules for sensitive data.
- **To-Be Concept & Implementation:** Optimizing current systems or—where clear business value exists—introducing/consolidating M365, SharePoint, Teams, and OneDrive. (Technical configuration and cloud security are executed in tandem with qualified IT partners).

> 📦 **Concrete Deliverables:** IT/Information Landscape Map, As-Is/To-Be Gap Analysis, Data Cleansing and Migration Blueprint, Platform and Licensing Decision Framework, Access Rights Matrix, Implementation Roadmap, User Training Manual.

3. Two Prioritized Entry-Level Offerings

Offering	Target Group	Scope & Focus	Key Deliverables
Offering A: Corporate Structure & People Assessment	SMEs facing unclear responsibilities, questionable staffing needs, inconsistent recruiting, or a lack of KPI-driven management.	Document review, targeted interviews, evaluation of organizational charts, and existing role/KPI setups. Core focus on alignment, structural capacity, recruiting, onboarding, and clear accountabilities.	• Compact Assessment Report • Priority Action Matrix • 3 to 5 concrete strategic recommendations • Implementation Roadmap
Offering B: Information, Workplace & Documentation Assessment	SMEs struggling with chaotic file structures, legacy IT silos, non-standardized templates, missing document guidelines, or ambiguous access rules.	4-phase audit spanning: Current IT/data structure, User requirement mapping, Strategic options review (optimizing legacy systems vs. full M365 migration), and To-Be Architecture design.	• High-level target architecture • Data cleansing strategy • Rights & governance framework • Comprehensive project effort estimation

Note on Offering B: *This assessment explicitly does not sell a premature SharePoint implementation. The client first gains absolute clarity on whether optimizing their current setup is sufficient or if a migration to Microsoft 365 is economically and organizationally viable.*

4. Cross-Functional Topic: Corporate Identity

Corporate Identity (CI) is not treated as an isolated graphic design relaunch. Instead, it is established as a binding operational standard for everyday business: unifying terminology, typography, color palettes, logos, template architectures, file naming conventions, digital portals, approvals, and clear responsibilities. A full brand redevelopment is only included upon separate, explicit client request.

5. Cooperation & Operational Responsibility

Role	Assigned Tasks & Responsibilities
Engagement / Referral Partner	Introducing qualified corporate contacts; initiating initial match-making calls and appointments upon request; utilizing standardized brief informational material. No technical execution or binding project commitments.
Vanguard Strategy Partners	Scoping, client onboarding, technical and strategic lead, execution of assessments, concept design, core documentation, and main client communication.
Technical IT Partner	Technical Microsoft 365 tenant configuration, cloud security hardening, complex data migrations, and infrastructure implementation according to the agreed scope.
The Client	Providing dedicated internal points of contact, full access to current operational data, timely executive decisions, sign-offs, and necessary internal resources.

The Referral Partner does not participate in technical implementation and does not issue binding quotes regarding project scope, pricing, or timelines without prior approval from Vanguard.