



PROJECT SUMMARIES

REPRESENTATIVE CLIENT EXPERIENCES

SMALL ENGINEERING COMPANY

Comprehensively repositioned a subsidiary operation with 10 employees, restructured an existing business model targeting public school systems nationwide. The existing business model was now non-competitive due to performance-based competition and dramatic restrictions by state legislatures in the funding of school systems nationwide. Developed new processes, key marketing tools and alternative terms, conditions and core value propositions to K-12 clients, distributors and aligned service partners. Expanded the service offering to other types of non-profit entities.

LARGE ENGINEERING COMPANY

Supported a 2-year transition of partner, senior leadership and marketing talent, provided a broad set of strategy, advisory, marketing and communication services to an engineering firm serving global markets in agribusiness, industrial and commercial sectors. Designed and developed a new logo and marketing materials, writing critical communications and organizing a major corporate anniversary event that rebranded the company. Coached numerous employees in various departments on best practices in marketing communications and customer engagement, and provided strategic support to over a dozen principals and senior associates.

MID-MARKET FACILITY SERVICES COMPANY – MULTIPLE BRANDS, NATIONAL MARKET

An entrepreneurial-minded \$250MM+ publicly held facility services firm with thousands of employees, serving small and enterprise-level clients nationwide in commercial, industrial, educational, healthcare and financial sectors. Initially, the company recognized that sales leaders and sales representatives were under-performing and newly hire sales executives were not achieving sales objectives. We were hired to create a highly-customized sales process incorporating company-specific values, products, services and narratives. The new Sales Playbook—which detailed Hiring, Onboarding, Sales Engagement and Management Processes—was applauded from the C-Suite to the sales representatives nationwide.

Three months after receiving their new Sales Playbook, we were hired to train the sales force. We conducted a Beta session involving on site personnel and web-based participation of sales representatives, followed by a 3-day, a 2-day and a single day **REAL WORLD Training** session in the following 6 months. All sessions were customized to reflect realistic client-specific sales scenarios, using facilitated role playing and Train-the-Trainer sessions. Sales leaders were included in the training to help evaluate sales competencies, and to strengthen their mentoring capabilities.

TECHNOLOGY REMANUFACTURING AND REPAIR COMPANY

Company was led by an inexperienced owner who relied too much on a hands-on controlling “lieutenant” to run the company. Company morale suffered from two different classifications of employees, insufficient training, and employee roles and responsibilities that were unclear and conflicting. Restructured management, sales, customer service, hiring practices, and job training. Implemented new performance measures for customer service. Provided additional resources for management, human resources and training.

MID-SIZED GENERAL CONTRACTOR / COMMERCIAL MARKET

Led company-side revenue growth, business development, sales and marketing communications, while jointly leading a business unit targeting a market niche. Dramatically increased company and business unit revenues while rebranding key elements of the company. Increase in total company revenues accomplished by mentoring over a dozen key employees to modify their behavior, resulting in a tripling of their close rate on submitted proposals to clients.

STARTUP NON-PROFIT ORGANIZATION

Engaged by three non-profit entities as an interim executive director to form and structure a new non-profit organization focused to model sustainability in residential housing. Organized all external stakeholders, agencies, employees and volunteers into a functioning, cohesive organization. Developed processes, operating systems and marketing elements to build the brand in Minnesota. Led a Visioning Exercise for over 40 stakeholders, clarifying

strategic objectives and roadmaps to accomplish same. The non-profit is currently rebranded as a multi-state regional organization, experiencing strong growth.

CUSTOM OFFICE DESIGN AND FIXTURE COMPANY

Challenged by second generation family ownership and conflicting leadership, long-term employees were conflicted on management styles and perceived favoritism of a younger owner/manager. Led new organizational awareness, plus clarified and balanced owner leadership and employee manager roles. Improved communication and training processes.

ESTABLISHED NON-PROFIT ORGANIZATION

Developed a comprehensive Strategic Plan on a pro bono basis, repositioning the non-profit's 40-year old for-profit subsidiary into a more market aligned service organization. The subsidiary operation experienced significant growth in revenues in the following years.

SCIENCE RESEARCH AND CONSULTING COMPANY

This business was misaligned among its ownership and professional staff due to a company transition to an ESOP. Some employees were not taking on responsibilities that would successfully move the business to an employee owned and managed company. Addressed and rectified a territorial and entitlement company culture, sales process, mix of clients, client management, time management, accountability, professional development and training. Restructured roles and responsibilities. Addressed dysfunctional employee engagement and sales training to meet company performance requirements.

SMALL ARCHITECTURAL COMPANY

Hired by the firm's principals to analyze their existing business model and recommend brand design changes to generate new revenues in a shrinking market for their mix of architectural services. Analyzed their market and key competition, led a GAP and SWOT Analysis, Key Employee Capabilities review and Company Visioning Exercise to affirm desired market direction. Delivered a complete rebranding of website, collateral materials and a Marketing/Sales Plan targeting existing and new market segments. The principals referred to the project deliverables as a "force multiplier."

MULTI-LOCATION GAS STATION AND AUTO REPAIR COMPANY

The "hands-on" owner who was unaware of the untapped potential of the company's employees. Transitioned the business from an almost completely owner directed and managed organization, to an employee led and managed business. Employees had previously untapped motivation. Their capabilities were raised to take on additional roles and responsibilities. They developed a new customer service communication process. The owner was quickly able to move from working "in the business to working on the business," enjoying fewer personal working hours, low turnover and increased revenues until the company was sold. He refers to the organizational change and learning process as the best thing he ever did in his business.

SMALL REAL ESTATE DEVELOPMENT COMPANY / GENERAL CONTRACTOR

Analyzed market conditions and provided a set of actionable initiatives to rebrand and turnaround a high profile, 3-phase, 100+ unit condominium complex that was struggling with closing unit sales, unable to move into the third phase of construction. Provided recommendations that accelerated sales and achieved stated goals.

MACHINE FABRICATION COMPANY

In a long-term ownership of a business by two families across two generations, the organizational assessment indicated conflicting management styles, and generational differences between the two primary company leaders. Two owners were each managing half of the company differently. Employees were confused and unable to perform their jobs with accountability to meet company objectives for revenue and growth. The misalignment was so severe, that the older of the two owners sold out to the younger owner. Management roles, training and processes were revised to be accountable to one overall leadership and management process.

SMALL GENERAL CONTRACTOR / COMMERCIAL MARKET

Led a group of 5 owners in a collaborative and iterative process to craft a long-term Strategic Plan, encompassing a detailed analysis of their current client mix and how best to market to each customer type. Led a Customer Experience Focus Group interview of a mix of industry leaders from existing clients. Led a Company Visioning Exercise and provided a report detailing a series of actionable strategies and marketing initiatives to enhance revenue growth.

MID-SIZED INDUSTRIAL SERVICES COMPANY

Provided technical support, operational, marketing and sales to a firm providing specification and advisory services to steel fabricators, OEM's and public agencies focused on corrosion protection services. Dramatically improved the communication of requisite technical information to customers, improving inbound technical

compliance challenges that constrained quality and schedules, which ultimately improving customer satisfaction levels, which resulted in a 70% reduction in the average production order delivery timeline and significant improvements in revenue and margins.

MID-SIZED FULL-SERVICE IT COMPANY

In a **Phase One** project, we interviewed owners and key sales and operational executive, provided companywide SWOT and GAP Analysis (metrics and behavioral) and a set of functionally segmented and prioritized recommendations to improve operation, establish an aggressive sales growth track, improved customer experiences and stronger customer relationships. In a **Phase Two** project 6 months later, we conducted a series of Customer Experience (CX) qualitative interviews with selected customers, and generated a comprehensive report detailing positive and negative customer experiences, and recommendations to resolve each. We now conduct semi-annual Customer Experience interviews of newly on-boarded clients.

MID-SIZED SITE SECURITY SERVICES COMPANY

In a 50-year old family business, charged to identify and provide strategic and tactical recommendations to accelerate new customer growth in advance of an ownership and equity transfer to the next generation, we interviewed the owner and senior executives, surveyed operational employees to assess cultural and behavioral issues, and conducted a SWOT Analysis. We conducted a Company Visioning Exercise to establish strategic direction. Our recommendations provided operational, marketing and sales priorities, and have led to successful engagements with two other management consulting firms for services outside of our areas of expertise.

ESTABLISHED PUBLIC SECTOR NON-PROFIT ORGANIZATION

Provided a Visioning Exercise for all stakeholders that supported an organization dedicated to public sector employees, delivering a set of self-directed strategic options and tactical recommendations to realize their own goals and objectives.