



General Business and Finance

The Watson Writes Portfolio

(These are just a sampling of the dozens of articles written on this subject matter)

Financial Advisor Ad Copy

Turn Your Savings into Wealth.

We Will Show You How.

Ohana means “family”, and we are all about enriching yours. Wealth means assets that work for you. We help you take what you have worked hard for, and make it work hard for you and your family. Call us now!

Ohana Wealth Management: the hearts of family, the knowledge of experts

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Wealth produces income for you.

Are your savings working hard enough for you?

We are Ohana Wealth Management. Ohana means family. Your wealth means your financial security. We bring the industry expertise to maximize all for which you have worked. Your family’s well being is important to you, and that makes it important to us. Call us today!

The Secrets of Turning Savings into Wealth:

We are here to share them with you

The first secret is Family—and focus on its priority. Ohana Wealth means family and turning savings into security to protect it. Boggled by concepts like professionally managed asset accounts, stocks, bonds, ETF's and mutual funds? We make them easy to understand, and more, easy to make work for you. Call us now!

Longer Ad

Ohana means “family”.

Can you turn your savings into income-producing wealth for your family?

We are the industry experts who care about you, and what is important to you. You have worked hard to accumulate your savings. We are the experts who care that your savings now work hard for you to achieve solid security for your family and your life. Our tool kit includes professionally managed asset accounts, individual stocks, bonds, ETF's, mutual funds and more.

Are those confusing? You bet. But, don't worry. You have us to simplify them and build the perfect plan for your goals. Call us today, in our hearts, we think of you as “ohana” and in our heads, we will be thinking out your path to success.

The 4 Points of Focus

More than just business coaching

*“With our Four Points of Focus as your compass, you can take your business to an optimal level of profitability, scalability, sustainability and ultimately achieve an organization of value whether you choose to open it to acquisition or other end-game options.” Wendy Roberts, author, in **The Only Business Compass Your Company Will Ever Need***

Let this proven methodology transform your company with state-of-the-art business coaching and financial consulting!

Focus is the key to success in business. It is not about doing more things but doing the right things. It is not about being busy but about being productive. It is not about being distracted but about being determined.

The 4 Points of Focus are components of a proven methodology that will help you exceed your objectives and supersize your company’s value. We have identified the crucial aspects of your business within the Points. Should you perform to 100% potential in all these areas, you will surpass your highest revenue ideals, keep a generous portion of your profits, achieve your wildest dreams and make your company a highly desired acquisition when you decide to make a lucrative exit. We provide business and financial consulting with impact!

Market Identification: Identify and Focus on the Best Customer (Red- hitting the bullseye, good fortune and passion)

Your successful strategy is not unlike a great journalist. It comes down to the basics : who, what, when, where and how. Who is the best prospect for spending the most money with your company? What are their hot buttons that they need satisfied? Where do they go for information about your product or service? How do you reach them, and how much should you invest to reach them? When do they need you and how can you expedite that need? Your marketing strategy will have the answers and a list of tactics to capture the revenue, and ultimately, the business valuation, you deserve.

Financial Structure: Achieving Healthy Profit First (Green- money, vibrant growth, rich crops)

Your financial metrics and statements tell the story about your company’s health and real-time value. If your company is on a path to failure, the diagnosis will appear here first. How can cash flow and profit margin be improved? Are you making money each quarter? Are you sure? What is the optimum balance of debt and equity financing for your firm? We will help you quickly define and analyze the most important metrics for your business through time tested financial consulting methodologies and present a blueprint for enhancing business sustaining profits.

Operational Excellence: Efficiency Driven (Orange- gold, innovation, bright solutions, try something new, aura of success)

Now you see that you are making money, it is time to assess the area that could derail you with a strong business consulting analysis: you need to have operations that are not draining your resources. Your

operation must be efficient, professional and produce the most effective outcomes. It also must be documented, repeatable and able to be fulfilled by new or substitute team members without the need for a huge learning curve.

NorthStar Strategic Partners provide experience across multiple industries and business operation procedures. We represent innovative tools and concepts to continuously improve your day-to-day operations to save you money while keeping your clientele happy.

Amplifying Your Human Resource Talent: Enhance Employee Performance and Value (Blue- “true blue” trust, depth, loyalty, sincerity, wisdom, confidence, stability)

Developing the quality and dedicated team building needed to achieve your business objectives is one of the biggest challenges you might face as a business owner. It is a challenge you must succeed in, however. Your team is the center to the value of your company. No business consulting or financial consulting will help if your team is not aligned, supportive and productive. It is the factor in maintaining long-term client relationships, and it gives you your best chance at top operational effectiveness. The tactics in this area include attracting the right talent, and training the talent that you have.

NorthStar Strategy Partner experts deploy a proprietary assessment tool that will give you immediate information on how your team compares to your industry’s standard, and their ability to implement best practices. We help you develop a comprehensive recruiting, training, and incentive program to identify and retain the key team members you need.

See how our service packages take you beyond financial consulting and business coaching to your company’s achievement of its optimal valuation! <hyperlink to the services page>

Take Your Company from Good to Great

... That’s what we do

NorthStar Strategic Partners is the business consulting firm to guide you

4 Points of Focus

Our proven 4 Points of Focus methodology empowers you with the required business discipline to exceed your profit, sustainability and scalability objectives.

Marketing Strategies

Who is your most lucrative target customer, how do you reach them, and most importantly, how do you excite them into doing business with you?

Financial Structure & Growth

We define and analyze the most important metrics with thoroughly tested financial consulting methodologies and present a blueprint for enhancing business sustaining profits.

Operational Excellence

NorthStar Strategic Partners represents innovative tools and concepts to continuously improve your day-to-day operations to save you money while keeping your clientele happy.

People & Team Building

We deploy a proprietary assessment tool that gives you immediate information on how your team compares to your industry's standard and can implement best practices.

Business Development Strategies

To optimize profit, scalability and sustainability

We have all heard the exclamation "it's like a jungle out there!" especially in trying to navigate the business world. NorthStar Strategic Partners' 4 Points of Focus will lead you to profit optimization, scalability and business sustainability, in ways that aimless wandering will never accomplish. CEO and author Wendy Roberts has amassed a team of business consulting experts to develop a customized guidance package to directly meet your company's needs and fill the specific gaps in your path to success. Our initial discovery consultation is complimentary, so please connect with us [NOW](#). Your future awaits.

We are the Business Consulting Team You Need
Reach your Personal Polaris

The methodology and strategies of our business consulting team have been developed by accomplished industry expert and author Wendy Roberts. Robert's book ***The Only Business Compass You Will Ever Need***, along with the services our team provides, brings you to your exit strategy, profit optimization, and maximizing your company's worth.

Our Strategic Services Packages

Pointing your business in the right direction

Wanderer Bronze Package

<Front> Get started with business advice – review of your 4 Points of Focus

<Back> Includes communication with your key team members, and phone and email support.

Traveler Silver Package

<Front> The Wanderer Bronze package plus additional deep dive into your company processes.

<Back> Team collaboration, profit first/cash flow session, annual planning session with our experts

Navigator Gold Package

<Front> Maximize profit: Hands-on weekly help from our experts plus Traveler/Silver packages

<Back> Includes additional tools and KPI processes/assessments and quarterly tax planning.

What our Clients are Saying

FROM MARCUS ANTHONY VACA,

CEO OF THE RISE FULFILLMENT NETWORK

"The personal and professional growth I have experienced with Wendy Roberts and NorthStar has help me escalate my business and mindset to new levels. They have invested the time to build strategies that continue to grow who I am as a human and a business owner."

<Recommend adding this section above Helping guide you on your quest. >

Helping Guide You on Your Quest

The business consulting customized to your needs

You are on a business journey. Do you know the direction in which your business is headed? Many businesses, unfortunately, do not. According to Investopedia, 20% of businesses fail during their first two years, 45% fail in their first five years, and 65% fail in their first decade. These businesses either did not see the path they were on, or if they did, did not know how to manage and correct it. We are here to make sure your path is steady, productive and successful.

Set up your complimentary discovery consultation right now.<Hyperlink>

NorthStar Strategic Partners is dedicated to not allowing the fates of those failed businesses happen to you. We are about helping you find your North Star, your Polaris, your brightest light of success, and scoping out the path to achieve it.

NorthStar Strategic Partners are the Business Consultants Who Guide You to Your North Star

NorthStar Strategic Partners Drive Your Success, Excellence and Valuable Profits with 4 Points of Focus

NorthStar Strategic Partners has a vast record of driving powerful strategies specializing in executive leadership training, business consulting, and business valuations services, leveraging cutting edge and emerging technologies including data analytics, AI, cybersecurity and GRC solutions.

We will give you focus and direction.

We use the symbol of Polaris, the north star, as the exceedingly bright and steady guiding light we all can see looking forward. It is your ideal, your goals, your dreams for what your business could achieve.

As your business travels on its true north path, our proven methodology helps you exceed your objectives and supersize your company's value. We have identified four crucial aspects of your business. Should you perform to 100% potential in all of these areas, you can surpass your highest revenue ideals, keep a generous portion of your profits, achieve your wildest dreams and make your company a highly desired acquisition when you decide to make a lucrative exit.

We are the team that can get you there.

The symbol of our company is a powerful compass that will guide you on your true north to reach your own Polaris.

NorthStar Strategic Partners was founded by Wendy Roberts, as a corporate finance executive, she pioneered expertise in corporate strategy, risk management, financial reporting, M&A, IT operations, audit/SOX reporting and system implementations. She has acted as the CFO for various startups navigating them to successful and rewarding acquisitions.

We can do the same for you.

NorthStar Strategic Partners offers three levels of service packages and consultancy. From programs that get you started, to weekly hands-on intervention, we offer you the assistance you need to reach success based on your level of need and degree of mastery.

We guide you through the 4 Points of Focus which include marketing strategy consulting and market assessment, financial consulting, business analysis and business scaling, and team assessment. Our process will give you access to several proprietary tools, webinars, e-books and custom consultation sessions.

Contact us today for your discovery consultation.

Find out what program we can develop specific to your needs, bringing you greater profit and maximizing the valuation of your company.

A business leader can be like a lost explorer...here is your path to profit optimization

The Only Business Compass You Will Ever Need

We have all heard the exclamation “it’s like a jungle out there!” especially in trying to navigate the business world. That feeling of being overwhelmed by the chaotic arises just in the efforts to keep business moving and alive, let alone to achieve true profit optimization. It does not even broach the concept of building a business to its ultimate fruition: to become a valued and valuable entity of which you can sell at high profit in an exit strategy.

This book will guide you to that kind of ultimate success. Focus is the key to success in business. It is not about doing more things but doing the right things. It is not about being busy but about being productive. It is not allowing distractions and embracing determination.

Based on NorthStar Strategic Partners 4 Points of Focus methodology, this book acts as your compass to take you through the four vital areas of business discipline. By following the path the 4 Points of Focus lay out, and succeeding in each area, you are all but guaranteed achievement of the goal you designed for yourself. If you haven’t even defined that goal, this book helps with that as well. The 4 Points of Focus will lead you to profit optimization, scalability and business sustainability, in ways that aimless wandering will never accomplish.

The Only Business Compass You Will Ever Need will introduce you to a “magic formula” based on achievements in the areas of Marketing Strategies, Financial Structure & Growth, Operational Excellence and People & Team Building.

- It will guide you to generate revenue with the right marketing investments, capture a loyal customer base and earn high business returns for your marketing expenditures.

- It will show you financial systems that maximize your revenue, and give you guidance to analyze your profit margin, your gross profit, your working capital and net profit.
- It will guide you to reduce and remove waste that detracts from your revenue profits and introduce you to sound and efficient operations concepts that are both cost saving and mission effective.
- It will guide you to develop and retain the talent that makes your company valuable. It takes you through a gap analysis of your existing team, their level of job ability and satisfaction so you can compare them to highly effective company teams in your industry.

Finally, ***The Only Business Compass You Will Ever Need*** brings you to your endgame, your exit strategy, profit optimization, and helps you determine what your company will be worth, and how to maximize its value.

The Only Business Compass You Will Ever Need and NorthStar Strategic Partners are the brain children of the accomplished industry executive, Wendy Roberts. Roberts boasts 25 years in financial and audit leadership, operations expertise and technology innovation experience for both SMB and multinational companies, delivering relevant expertise in corporate strategy, risk management, financial reporting, M&A, IT operations, audit/SOX reporting and system implementations. She has a vast record of driving powerful strategies using emerging technologies including data analytics, AI, cybersecurity and GRC solutions.

Back of book copy

The Only Business Compass You Will Ever Need: The 4 Points of Focus

Based on NorthStar Strategic Partners 4 Points of Focus methodology, this book acts as your compass to take you through the four vital areas of business discipline. By following the path the 4 Points of Focus business strategy consulting lays out, and succeeding in each area, you are all but guaranteed achievement of the goal you designed for yourself. If you haven't even defined that goal, this book helps with that as well. The 4 Points of Focus will lead you to profit optimization, scalability and business sustainability, in ways that aimless wandering will never accomplish.

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Finally, ***The Only Business Compass You Will Ever Need*** brings you to your endgame with business strategy consulting guidance from industry experts and giants. It will help you define your exit strategy, profit optimization, and helps you determine what your company will be worth, and how to maximize its value.

About the Author, Wendy Roberts

The Only Business Compass You Will Ever Need and NorthStar Strategic Partners are the brain children of author, speaker and accomplished industry executive, Wendy Roberts. Roberts boasts 25 years in financial and audit leadership, operations expertise, and technology innovation experience for both SMB and multinational companies, delivering relevant expertise in corporate strategy, risk management, financial reporting, M&A, IT operations, audit/SOX reporting and system implementations. She has a vast record of driving powerful strategies using emerging technologies including data analytics, AI, cybersecurity and GRC solutions. She has acted as the CFO for various startups including an early-stage software company successfully selling it to a large publicly traded company. She spent many years in the public accounting area delivering solid results for her customers in accounting, audit, tax, and IT systems.

Roberts is currently serving on the Audit Committee of The Tech Interactive, a world leader in the creation of immersive STEAM education resources to develop the next generation of problem solvers.