

- A privately owned medical product manufacturer and distributor.
- Sales increased by at least 25% per year for 15 years.
- Coached the President for 15 years and facilitated annual strategic planning meetings and executive team meetings.
- Developed the best motivated and productive team in the industry through leadership training and change management programs.
- Designed a flexible organization structure and a unique culture that enabled all management teams, sales and administrative employees to work out of their homes in Europe and North America
- Having no bricks and mortar offices on a global basis for staff resulted in having the highest profits in the industry.



Case Study # 1

Unlocking the value of a start-up company through annual double digit growth

- A large diversified forest products company that was underperforming.
- Facilitated new strategies for growth for the Business Unit Presidents of 3 business units.
- Assessed the key managerial talent of the corporation.
- Facilitated a series of 3-day leadership training workshop modules for this company's 200 key executives.
- The company was able to pivot towards more profitability by focusing on their most competitive business units.



Case Study # 2

Strategy, talent pool and leadership training

- A privately-owned company with a chain of franchised auto collision stores.
- Coached the CEO on strategy, organization design and talent pool.
- Developed a new strategy and a stronger organizational structure to better service the franchises.
- Helped the CEO establish an Advisory Board to achieve the best advice and governance.
- Trained leadership team on performance management and goal setting.
- Number of franchise stores grew by 2.5 times by unbundling some of the services with smaller stores.
- Company was sold to a large USA based company at a premium price.



Case Study # 3

Unlocking the value of your Company

- Privately owned second generation electrical contractor had a history of struggling with no clear strategy for growth.
- Developed the strategy, the plan of execution, assessed the team and developed a stronger organization structure to support the 3 divisions.
- Management team trained on goal setting and leadership practices.
- For 5 years coached second generation family member to take over from the Founder.
- All 3 divisions grew in sales and profits especially the service division through selling services to large institutions.
- Formed an effective Advisory Board.
- Company sold to a large Canadian electric industry consolidator.



Case Study # 4

Working with a second generation company to achieve growth

- A family-owned transportation company with 20 older tractors and trailers struggling to find profitable and steady routes to make an acceptable profit.
- Facilitated strategic planning meetings with family members.
- Result was to focus on leasing warehouses to take advantage of the supply chain boom.
- Coached one of the owners on strategy focus and execution, delegation and leadership practices.
- Company is now profitable operating 3 large warehouses.



Case Study # 5

Moving to a more profitable supply chain business model

- A privately owned electrical power equipment distributor.
- Facilitated a growth strategy and a new goal setting program to implement the strategy that called for the doubling of sales.
- Worked with the senior team to assess management and key staff.
- Facilitated leadership and management skills workshops.
- Sales increased dramatically and doubled through an expansion into western Canada and then doubled again through a new product introduction.



Case Study # 6

Plan & grow your Company through growth strategies and leadership development and training

- A chemical supply company after having gone through a bank workout due to a lack of cash flow.
- Facilitated a growth strategy and workshops with the senior team to overcome several team dysfunctions.
- Implemented a new goal setting program to meet strategic goals and trained managers, supervisors and key staff on effective leadership practices.
- Worked with the senior team to assess all employees and strengthen the organization structure to sustain growth.
- Sales increased dramatically over 5 years and doubled again due to a planned rapid expansion into the USA.
- For 7 years coached the President and project managed the strategic projects through facilitating monthly executive team planning meetings.



Case Study # 7

Grow your company's sales & profit dramatically and expand to the USA

- A second-generation furniture distributor that had maxed out their line of credit. The Founder was considering shutting down the company as he was using his private money to finance an excess of inventory.
- Facilitated a growth strategy and a new marketing plan to sell fewer big-ticket products to dealers and concentrate on selling high demand accessory products.
- Implemented a program of selling furniture accessories and small furniture such as bar stools online through large retailers.
- Started their own company website under a different name and division to sell smaller high turns furniture and accessory products.
- Coached the second-generation President on improving his leadership skills and working on the company strategy rather than on a day-to-day basis.
- Stale big-ticket inventory was decreased dramatically and turns on the smaller furniture and accessory products increased exponentially.
- Cash flow increased and the company paid back the line of credit and the family now has a viable company run by the second-generation President.



Case Study # 8

Growing profitably to pay back large line of credit & maintain the company for second generation.

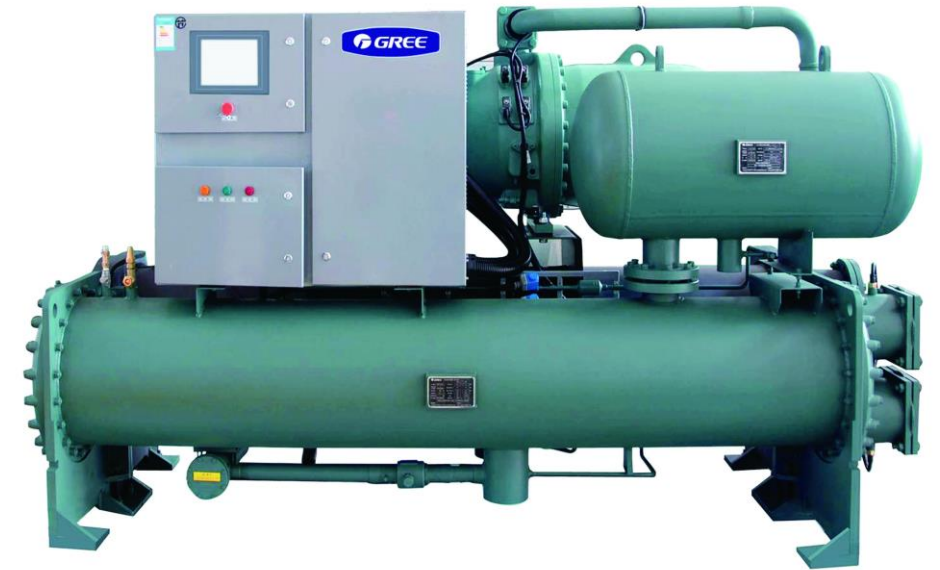
- A privately-owned Canada based shipping brokerage company with operations covering North America and several small branches in China.
- Developed a strategy and coached the owner on becoming a global player in brokering containers from China and India to North America.
- Re-organized the North America division and appointed a President to allow the owner to focus primarily on China and India ocean container traffic.
- Owner established an office in Hong Kong to hire a sales team to call on manufacturers in India and China.
- With the larger sales staff the number of manufacturing customers increased dramatically. With more customers and containers to broker the owner gained significant price discounts from the container shipping companies.
- The number of branches grew to 25 cities in China providing expeditious shipping coverage for manufacturers in China.



Case Study # 9

Privately owned Canadian shipping company

- A Canadian based manufacturer providing water purifying equipment for chillers for high rise buildings and other commercial or industrial buildings.
- Company was owned by a group of angel investors.
- Company had never made a profit and burned a significant amount of cash every month.
- Investors met periodically to decide whether to invest more cash or shut down the company.
- Coached the CEO to develop a plan to stop the monthly cash flow burn to enable the company to be sold.
- In less than a year the company became profitable and was sold to a company with several water related environmentally based companies.



Case Study # 10

An angel investor owned Canadian company finds a way to make a profit in order for the investors to sell the company.

- A privately-owned company providing the Canadian trucking companies with transportation risk consulting services.
- Company had not made a profit for several years.
- Developed a strategic plan and helped the owner with the plan implementation.
- Meetings arranged with the employees to announce a new organization structure and develop employee goals to support the new strategy.
- Facilitated monthly team meeting to review strategy and individual goals.
- Coached the owner on strategy, sales and leadership practices.
- Provided an assessment of owner's strengths and weaknesses.
- Sales doubled in a year and the company achieved a profit for the first time.



Case Study # 11

Unlocking the your Company's value by moving to profitability

- A privately-owned global manufacturing company of large machine counsels for the energy and mining industries.
- Developed a strategic plan and an implementation plan for each of the two divisions.
- Assessed team and strengthened the organization structure to drive growth.
- Facilitated managerial team meetings focusing on leadership practices and building trust.
- Coached the President of the Company and the G.M. of one of the divisions on strategy and leadership.
- Sales increased by 20% for the global manufacturing division and by 35% for their manufacturing rep. division.
- Formed two companies to allow the manufacturers rep. division to accentuate its own branding and identity for growth.



Case Study # 12

Unlocking the value of your company
through strategic planning & leadership
development