



Dr. XXXX,

As we discussed, I impart some 30+ years of experience centered around the various facets needed to build a viable and successful business. Educated as a lawyer, my experience spans the finance, technology, market assessment and analysis and business development execution.

Myself and my partners have built a very successful boutique firm focused on assisting and guiding early and mid-phase service and technology companies move to the next level of their growth. What we have learned time and time again, is that many emerging companies have failed to do the necessary work to develop a cohesive, clear and defined road map to future success.

Often times these “great ideas” were started by good folks like yourself that saw a need ...and found a solution. The problem is that they immediately went into action, usually on a part time basis and on a shoestring budget, without much regard for the future ...they were focused on the here and now! One day they wake up and realize they may actually have something of value and make a decision they want to “go to the next level” but they don’t even know what the next level is, how to get there, how much it might cost, what resources they may need or is growth even achievable.

Companies like this tend to be in desperate need for “top-of-the-house” management and experience but don’t quite have the resources to hirer full time talent. Or, the entrepreneur gets caught in the chasm between the company not having enough momentum (revenue) to abandon their current position and the new company screaming for attention. I’m probably not telling you anything you didn’t realize yourself.

This is where I step in. I give the emerging company the time, attention, contacts and experience needed to help expeditiously move the company to that next level. My work is very pragmatic, incorporates well established tools like Six-Sigma and lean processing and utilizes other well know business assessment tools all designed to define what the next level is, how to get there, what resources are needed, etc. This ultimately leads to an agreed upon business plan and strategy for growth. A roadmap for success if you will.

My work doesn’t stop there. I, along with you and others that may be involved, not only define what needs to be done to get to where we want to go, but actually do the work to help get there. The process tells us where we need to go, what needs to be done and puts everyone on the same page marching in the same direction. I further help align business partners, develop new clients, identify and source need resources and keep my client informed of our progress. All the work that needs to be done, but the client doesn’t have the time, contacts or particular know-how.

PHASE I - Each of my engagements requires a “deep-dive” assessment of the current business and a defining of what the ultimate goals are for the future. Framing the work under a **GOALS, STRATEGIES AND TACTS (GST)** structured assessment provides all of us with a clear pathway to success. I cannot emphasize enough how important this is, and something that should be revised and fine-tuned annually; if not more regularly.

PHASE II - Once we have defined clearly of where we want to go and how we might get there, we complete an assessment to determine if we have the right resources, what we are good at (so we can exploit it!), what encumbrances we have to over-come and what obstacles are in our way. ... This is called a – **STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS** analysis (**SWOT**).

PHASE III – Playing of the LEAN principles of efficiency and elimination of waste, I help direct the clients in assessing what activities are essential to achieving its goals and what might be a waste of time. This also includes the same analysis of market segment, channel partners, employees, contractors; everything needs to align with the goals we have established.

PHASE IV - I memorialize everything into a working timeline or **GANTT** chart and a **RANKED PRIORITY LIST**. This will help guide the company down a timeline vs. leaving it up to chance. It will also tell us what is most important and what is something that can be moved to a future date. We will establish milestones and know who will be responsible for what actions and tactics we defined.

XXXXX, I know this might sound fairly sterile and prolonged, but it can all be accomplished relatively easily with several hours of access to you. I will amass the information into a business workbook that we will review, tweak and use as our guide moving forward. This usually takes me about 30 +/- hours to complete. Then the hard part starts. Execution.

Regarding the opportunity to assist you with moving your business forward there is a process that I follow with every engagement. I do this with early phase, mid-phase, and established companies. Your current stage of development is not unique. In working dozens of companies that have had a desire to get to grow it always comes down to establishing a beginning, a middle and an end.

There are 4 elements of the process and they are as follows:

- 1) **GST**: Goals, Strategies, and Tactics
- 2) **SWOT**: Strengths, Weaknesses, Opportunity and Threats
- 3) **LEAN**: Removing waste and inefficiency in the process
- 4) **GANTT**: Internal assignment of tactics to fulfill strategy relating to goals

Each of these phases is relative to the other and each is critical to developing an understanding of both macro and micro planning going forward. Remaining disciplined to this process demands time and work effort and ultimately produces the road map to success.

### Phase I GST

#### **Goals: (targeted achievement)**

How many case reviews per week, per month, per year?

What are your revenue goals? % Increase, \$ amount, double, triple, et. al

Are you wanting to market services on a local, regional, state or national basis?

Are you wanting to build a company for sale with exit in mind?

Are you wanting to be part-time or full time?

**Strategies: (employed to achieve goals)**

Increase web presence: website, social media campaigns, SEO

Slide Deck and/or Video

Print: Brochures, Direct Mail

Seminars, Trade Shows, Industry Associations

Direct Sales and Business Development

**Tactics: (these are the actions behind needed to execute strategies)**

**Identifying content and resources to execute strategies**

**Phase II SWOT Analysis**

**Evaluating the current strengths, weaknesses, opportunities and threats to your business is needed to in order to optimize the achievement of your goals, strategies and tactics and to determine how you utilize, build and align company resources.**

**Only after the completion of Phase I & II can a Business Value Proposition be created to address the referral market audience**

**Phase III**

**LEAN Analysis**

**Evaluating current work-flows in order to remove waste and inefficiency in the process. Identify delegation opportunity and automation of work-flow where possible in order to reduce cost.**

**Phase IV**

**GANTT Chart**

**After completing initial three phases it is necessary to create a living document that will govern the tracking of action items associated with tactical fulfillment. This is how we measure performance activities toward our goal.**

