

Capability Statement

Steer Operational Solutions (SOS) stands as your dedicated partner for enhanced operational efficiency. Founded in December 2022 as a woman-owned small business, our unwavering mission is to deliver personalized support and strategy to Government, Corporate, and Nonprofit organizations. Specializing in Operations for Business Development, Go-to-Market Sales, and Customer Delivery and Support, SOS guides your business with a focus on impartial, consistent, and replicable processes—ultimately leading to enhanced efficiency, compliance, and profitability.

Core Capabilities



Needs
Assessment
and Pipeline
Development



Efficient
Program
and Project
Management



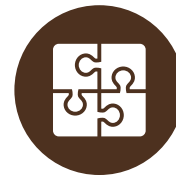
Go-to-Market
Strategy
Support and
Management



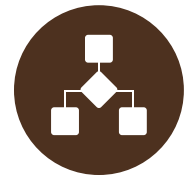
Strategy,
Operations
and Planning
Consulting



Vendor and
Call Center
Operations
Support



Organizational
Restructuring:
Aligning Mission,
Budget, Talent



Continuous
Process
Improvement
and Training

Company Snapshot

Steer Operational Solutions

WOSB Established: 2022
SteerOperationalSolutions.com
Baltimore, MD

UEI
YAEEPCGK2Q4

CAGE Code
9GJQ5

NAICS Codes
Primary
541611 (P) Administrative
Management and General
Management Consulting
Services

Secondary
541519, 541612, 541614,
541613, 541618, 561110,
58210, 611430, 611710

Differentiators

- ▶ **Decades of Operations Experience:** Tailoring services to meet specific client needs, considering scale, industry, and individual requirements.
- ▶ **Versatility from Individual Contributor to C-level:** Ability to work independently and cross-organizationally, bringing various skills and perspectives.
- ▶ **Fortune 500s to Start-Up Expertise:** Proven ability to develop service models to scale, allowing for adjustments based on clients' size and growth trajectory.
- ▶ **Geographic Accessibility:** Located in the DC/VA/MD area, with openness to periodic onsite collaboration.
- ▶ **Role-Focused Specialization:** Transferrable operations skills are not confined to a specific industry.

Certifications

- ▶ U.S. Small Business Administration (SBA)
Women-Owned Small Business (WOSB)
- ▶ Recognized by WBENC (Women's
Business Enterprise National Council)



Past Experience



Steer Operational Solutions, Inc (SOS)

Needs Assessment, Capture and Pipeline Development, Program and Project Management

- ▶ Work with large and small Government Consulting companies to assess current needs, build pipelines, support capture work, and Program/Project Management.



Transfr Inc.

Go-to-Market Strategy Support and Management, Strategy, Operations, and Planning Consulting

- ▶ Restructured annual revenue targets within the first 30 days, that led to exceeding Q1 targets by \$2M.
- ▶ Created a Sales playbook to maximize leaders' success, increase transparency, and build trust.
- ▶ Developed and implemented a companywide annual KPI review process to measure and track key business goals.
- ▶ Successfully recruited and hired over 35 FTEs, doubling the organization's size.



Stride, Inc. (formerly K12 Inc.)

Organizational Restructuring, Process Improvement, Vendor and Call Center Management

- ▶ Budget Management (\$20M+): successfully reduced the budget by \$ 7+ million by reorganizing the business unit and aligning the structure with the business mission through organizational efficiency.
- ▶ Launched multiple new organizations showcasing strategic vision, risk management, and the establishment of effective structures, including a Head of School Advisory Board, Vendor and Partner Board Relations, Program Management Office (PMO), and Online CHAT Sales and Service Support (including Level 2 Technical Support).
- ▶ Led multiple technology implementations, enhancing customer delivery, service, and retention for overall organizational success. Implemented Salesforce for CRM, Partner, and Board Relationship Management, TEXT, CHAT, and online technical help services. Implemented Five9 for telephony platforms, reducing repeat callers and transfers by over 15%. Successfully transitioned the entire organization to an online curriculum for all employees.
- ▶ Management of 1,500+ employees, contractors, and vendors, aligning workforce strategies with revenue generation.



Sirius XM Holdings Inc.

Program and Project Management, Vendor and Call Center Operations Support

- ▶ Led Program and Vendor Management teams effectively creating, executing, reporting, and optimizing retention programs.
- ▶ Ensured Customer and Employee Satisfaction through a merger.
- ▶ Developed and delivered successful Call Center strategies, including bonus plans with associated audits/controls, while executing a new offshore strategy.



Verizon Communications Inc.

Vendor and Call Center Management, Customer Experience Strategies, and Channel Marketing

- ▶ Created and managed the Customer First Retention organization, controlling People Management, budget, quality, and training.
- ▶ Established and managed Customer Care/Technical Support and Channel Marketing organizations.
- ▶ Successfully identified and delivered key programs that provided governance, stakeholder buy-in, strategic communications, and risk management, resulting in successful outcomes built for scale.