

# **CHARTING SUCCESS TOGETHER**



Leveraging more than 30 years of corporate leadership experience, I help small and mid-market business owners create sustainable and scalable enterprise value. As an expert in strategy and process, I use my experience to provide foundational strength to your business, resulting in higher valuations for your stakeholders.

I believe in a client-centric approach and tailor my services to meet the unique needs and objectives of your organization. I work closely with you to understand your challenges, develop strategic roadmaps and execute effective solutions.

#### **EXPERIENCE**

- Skilled Fractional Leader
- Certified Exit Planner
- Professional Recruiting
- Strategy & Process Expert
- Sales and Customer Service Training

## **INDUSTRIES SERVED**

- Distribution
- IT/MSP
- Manufacturing
- Construction
- Technology
- Insurance
- Logistics
- **Professional Services**

## **IDEAL CLIENT PROFILE**

Small-to-mid-sized privately-owned businesses with revenues in the \$5M-\$100M range that want to:

- Take their business to next level
- Improve their enterprise value
- Develop options for greater personal freedom (including exit options)
- Engage sufficient business management resources
- Think differently about how to manage their business
- Train their sales and customer service departments



#### SERVICES OFFERED



# **Strategic Planning**

Develop and execute business, sales and marketing strategies that stimulate business expansion so you can achieve your corporate goals.



#### Fractional Leadership

Provide leadership for your sales and marketing team to keep everyone on task and hold them accountable in order to meet business goals.



#### Infrastructure Development

Develop and implement sales and marketing strategy, process, organization and key performance indicators for scalable and sustainable growth.



## **Professional Recruiting**

Engage an in-depth recruiting and hiring process for maximum success at competitive prices for all sales and marketing roles.



#### **Exit Planning**

Employ a proven methodology to take a holistic look at your personal, financial and business goals and valuations in order to successfully transition your business in the next two to five years.



#### **Technology Solutions**

Leverage the ever-increasing number of technology tools to increase your efficiency and competitive advantage and support your growth efforts.



#### **Training**

Implement customized training programs designed for five or more people around topics such as business development skills, negotiation, and customer service. Available virtually or in-person.