

CONSULTING SERVICES

- ◆ BENCHMARKING
 - ◆ COACHING
 - ◆ FACILITATING
 - ◆ FINANCIAL/OPERATIONAL SYSTEMS
 - ◆ OWNERSHIP TRANSITION
 - ◆ SOFTWARE CONVERSION
 - ◆ STRATEGY DEVELOPMENT
 - ◆ STRATEGIC PLANNING
-

Dedicated to Improving Your Bottom Line
LEE JAMES & ASSOCIATES



OUTLINE OF SERVICES

All services are developed to meet the needs of the Employees, Clients and Company (profitability).

Benchmarking – Benchmarking your processes, systems, financial and operational performance enables you to assess strengths and weaknesses as well as understand how you compare with your competitors.

Coaching – Establishing rapport and trust with someone outside of your organization can energize you, your key people and provide new perspectives. A coach can enable and provide objectivity, feedback, listen to questions, share experiences and work together to maximize your performance

Facilitating – Through independent and experienced facilitation, teams are more creative, open and comfortable working together. Through listening, asking questions and engaging others, an experienced facilitator is able to clarify, understand issues of importance and bring everyone together for the intended purpose and good of the team.

Financial/Operational Systems – Through the development and implementation of strong systems and processes (including project management), improved efficient and effective operations result. Such systems support timely, concise, meaningful and easily understood financial and operational reporting needed to assure success.

Ownership Transition – Both internal and external services are addressed. Internal transition includes planning and implementing from inception through to long-term sustainable programs meeting needs of present and new owners. External transition includes merger & acquisition services of purchases, sales/divestitures and integration.

Software Conversion – Project Financial Management software systems are instrumental in tracking project progress. With clients demanding on time and on budget performance, these systems must deliver easily understood, timely and accurate communication to project teams and clients. Through obtaining an understanding of your needs, communicating what and how different software systems provide data and planning and managing the implementation process, a successful software transition will result.

Strategy Development – With strong competition, strategy is important to future success. Obtaining independent and objective advice can add significant value and further enable the development of strategy that more thoroughly considers relevant external and internal forces.

Strategic Planning – Leading a planning team through assessing where the firm is now and where it wants to be in the future. This process is proven to lead people through strategic thinking and assessment that assure appropriate areas are strategically addressed with the planning team determining the final results.

ABOUT LEE JAMES

Lee James is a CPA, CMC and CBI who has worked with engineers, architects and contractors for the last 25+ years and in private practice for the last 14+ years. Lee works with leaders in meeting business and management needs. Consulting, ownership transfer and training projects are continually in process. Lee is also active in planning and training for several engineering, consulting and mergers & acquisition professional societies.

Previously, Lee was Vice President for an international engineering consulting firm addressing business operational and financial strategy development, planning, reporting and management needs. Previously, Lee worked as the Chief Financial Officer for a computer software engineering firm and with Ernst & Young as a project manager and trainer.

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