

STRATEGIC PLANNING

FACILITATING & IMPLEMENTING

Dedicated to Improving Your Bottom Line
LEE JAMES & ASSOCIATES



SUMMARY

Facilitating the strategic planning process includes leading a planning team through assessing where the firm is now and where it wants to be in the future. This process is completed with no predetermined goals or specific outcomes. It 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.

Strategic action items are developed with metrics to measure progress. These action items address the what, when, where, who and how of assuring the strategic plan is implemented. After the plan is developed and documented, frequently assistance is provided in developing tactics to assure implementation is successfully completed.

PROFESSIONAL SERVICES

Services are personalized to meet the specific needs of your company. Example professional services include:

- *Review and understanding of company's history and present circumstances*
- *Customizing an approach and schedule*
- *Introducing and explaining strategic planning approach and process utilized*
- *Review and understanding of various business strategies deployed in Industry*
- *Review of past plans, continuing issues and present relevancy*
- *Assessment of strengths, weaknesses, opportunities and threats*
- *Scenario planning of future strategy alternatives*
- *Developing and documenting strategy for communication with others*
- *Developing implementation plan that includes specific tactics with champions and metrics to track progress*

BENEFITS

- *Team building*
- *Objectivity and independence*
- *Proven approach and methodology*
- *Industry and benchmarking expertise*
- *Combined focus on company, clients and employees*
- *Translating vision/mission into actions your people can do*
- *Defining strategy and what is expected for all to understand and work to fulfill*
- *Building additional focus and commitment in leading and managing the business*

CONSULTANT

Lee James is a CPA, CMC and CBI who has worked with engineers, architects and contractors for the last 25+ years. Lee is constantly completing strategic planning consulting engagements that include facilitating, planning and implementing the plan developed. The approach is customized to meet your specific needs.

Lee is active in several professional societies including the Institute of Management Consultants which provides professional designation of Certified Management Consultant "CMC". This certifies years of qualifying experience, ethics compliance, completion of required education and continuing annual education assuring compliance with ever changing rules and approaches.

Previously, Lee was Vice President for a privately owned international engineering consulting firm and worked daily in planning and managing strategic and tactical daily business aspects. Lee also worked with Ernst & Young as a Senior Manager and as the Chief Financial Officer for a computer software engineering firm.

For more information, please visit our website, email or call us:

Lee James & Associates

www.leejames.com

1-877-738-9140 Fax: 303-738-1009 Email: lee@leejames.com