



## Brochure Content

|   |    |
|---|----|
| Company Focus                           | 2  |
| The Company & Management Team           | 3  |
| Process Categories                      | 5  |
| Annual Climate & Goal Review            | 6  |
| Building Business Strategically (ELST)  | 7  |
| Coaching Executives                     | 8  |
| Customer Loyalty & Management Awareness | 9  |
| Developing Leaders & Rainmakers         | 10 |
| Executive Leadership                    | 11 |
| Leadership Development                  | 12 |
| Leadership & Team Building              | 13 |
| Management Development                  | 14 |
| Sales Development                       | 15 |
| Executive Strategic Planning            | 16 |

*Note: The selection of which process to select is determined in consultation with the ACEO2 Team, don't hesitate in contacting us at [info@ACEO2.com](mailto:info@ACEO2.com) Or 347.219.3888.*

*Thank you for your interest and time.*



## **I. Change in Strategic Focus**

After 6-years in business ACEO2 has expanded the Process Development Practice offering a Comprehensive Consulting Practice, consisting of engagements that focus on the current and future economic concerns of small and mid-sized firms. So there is no question of what is the size of the firms, they range from **25-150 employees with smaller engagements of one-on-one Coaching for owners of smaller firms.**

This capability is made possible by the involvement of new Senior Consulting Associates with backgrounds in:

- **Assessing a firm's needs and measuring capacity to change**
- **Financial assessment and dashboard development for operational management**
- **Developing organization structures to affect increased profits and productivity.**

Each of these specialized capabilities when combined with the introduction of updated and new RAC processes will continue to offer firms proven solutions tailored specifically to an organization's unique requirements.

**The touchstone of ACEO2's Mission is still:**

### **Developing People to Achieve Their Potential!**

Enlightened CEO's know an organization's most valuable asset is their employee. Yet, they are probably the single most underdeveloped asset. Some are sent to seminars and become all charged up for a week or so. But few are able to integrate what they have experienced into a comprehensive process of aligning firms' resources of: **people ...process....goals....and desired outcomes.**

As a firms' leader CEO's have often thought of the untapped potential within the organization! Just **imagine** if you could tap into that resource, your company could succeed and endure like the hundreds of firms energized by these processes.

**ACEO2 can do this for you!**

Think of just a few of the immediate benefits:

- **Greater Productivity**
- **Increased Valuation & Profitability**
- **Can-do Attitude**
- **Team Approach w/ Vision & Enthusiasm**  
**....and so much more!**



## II. About the Company & Management Team

**ACEO2 Consulting** is a dynamic organization dedicated to the growth of firms and development of employees.

By developing the right combination of goal development and implementation the result is to enhance employee commitment and create positive focus. We help people discover and develop their potential. Our clients' organizations develop cultures with continuous improvement; higher levels of achievement, and consistent standards of excellence are achieved. Our approach is unique, our materials timely, and our processes are dynamic and results oriented. These processes are implemented as they are introduced, thereby building employee motivation and participation in the changes they helped to design.

The proven processes assist people to expand and develop the skills and attitudes necessary to achieve a higher degree of success both professionally and personally. The methodology incorporates attitude development, goal setting and skills development into a process that results in greater utilization of the potential inherent in all people while enabling them to balance the profit motives of their business with the personal motives of their lives.

**ACEO2 Consulting LLC is a Certified Affiliate of Resource Associates Corporation (RAC)**, and as such is able to leverage proven methodologies and processes that hundreds of clients and hundreds of thousands of individuals have benefited from for the past 30 years. Our comprehensive development process covers the three ingredients needed to ensure success:

- ✓ Goal setting
- ✓ Attitude development
- ✓ Skills improvement

### **Management Team Enhancement:**

The ACEO2 Team is changing to offer greater depth and service capabilities through the appointments of three new **Senior Consulting Associates**.  
Namely:

***Dr. Janice A. Black***  
***Senior Consulting Advisor***

Specializes in conducting evaluation and analysis of corporate climate, for Management and Line operations. Janice has assessed and then developed hundreds of employees in goal setting and attainment.

***Donald G. Jacob, Ed.D,  
Senior Consulting Advisor***

A highly experienced Organizational Executive who has led diverse teams of professionals and volunteers to new levels of success in a variety of competitive situations in cutting-edge markets and fast-paced environments. Possessing strong leadership skills, with an impressive record of organization management, team building, resource development, strategic planning and project implementation.

***Robert W. Korkuc, CPA,  
Senior Consulting Advisor***

Has been a CFO at major and consulting to midsize firms performing financial oversight, strategic financial planning and “Dash Board “ development. He has significant ability in streamlining financial management operations by developing a Team-Approach with the employees of the finance department, thereby freeing the CEO to manage.



### **III. Process Categories**

Each of these processes have been have been proven through successful implementation and only introduced after discussions with the management team of the client. The involvement of the clients' team is key to implementing change as they develop the goals that meet the CEO's strategic plan and desired outcomes.

# Annual Goals Review



Every successful individual or organization has a plan. You need to know where you are today and what you want to accomplish in the future. However, just knowing what you want to accomplish is only the first component of a successful equation. The balance of a successful life is achieved by developing the specific plan and action steps necessary to accomplish that plan.

The Annual Goals Review will facilitate you through a process to help identify and prioritize your defined measurements for success and help you develop a specific plan of action through questionnaires, assessments, and goal achievement.

Setting clear goals for the things you want to accomplish in your organization and also in your personal life, creates a positive balance. There are no roads to “nowhere.” Achieving your purpose and your passion can be a reality!

## Organizational Elements

- Definition of Vision and Values
- Organizational Assessments
- Organizational Goal Definition
- Planning and Accomplishment

## Personal Elements

- Dream Inventory
- Personal Assessments
- Personal Goal Definition
- Planning and Accomplishment

## The Process

The Annual Goals Review is a structured, dynamic approach to goal achievement and personal success. This unique process allows you to crystallize those things that are important to you in both your organization and in your personal life, which helps you to define the plan to see those things come to fruition.



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*“This unique process allows you to crystallize those things that are important to you in both your organization and in your personal life ...”*

# Entrepreneurial Leadership and Strategic Thinking



Strategic Thinking is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is and what it does, with a focus on a predetermined future.

Strategic Thinking is the process of determining and envisioning the future to which you aspire and the growth you will have to realize to achieve that future state. It is a management tool which will help an organization do a better job focusing the energy of its employees, and ensure they are all working toward the same goals. It is also a tool used to assess and clarify the organization's direction and response to changing environments.

As an entrepreneur, you will need to concern yourself with visionary activities, planning, and leading people. As the leader for your business, people will look to you for direction. People will also look to you for coaching, leadership, guidance, support, decisions, and leadership stability. You now must decide what needs to be done to succeed, and then you must do it, and you must do it the right way.

Succeeding in business requires a vision combined with the passion and commitment to pursue that vision. It also requires a willingness to change, to learn, to become, and to take calculated risks ... it requires entrepreneurial leadership.

***“It is a management tool which will help an organization do a better job focusing the energy of its employees, and ensure they are all working toward the same goals.”***

Business owners and leaders today have found that developing a strategy and an implementation plan is far more effective than leaving the future to chance. Furthermore, developing a strategy, a vision, a mission, and a specific plan of action contributes to long-term, sustainable success. If implemented correctly, it will create higher levels of motivation and commitment, and fuel continuously higher levels of achievement from everyone within the organization.

## Steps for Planning an Effective Process

- Basic Foundation
- Vision and Values
- Values and Principles
- External Assessment
- Internal Appraisal
- Mission Statement
- Critical Goal Categories
- Market and Sales Plan
- Implementation

## The Results are Measurable

- Increased Revenue
- Strengthened Focus on Attracting, Servicing, and Keeping Customers
- Greater Employee Contributions to Results Realized
- Defined Strategic Direction
- Developed and Sustained Values
- Motivated Employees
- Measurable Growth
- Sustainable Results

## Developing the Plan

The Strategic Planning process provides a format for developing specific strategies, converting those strategies into a business planning process, and establishing measurable and attainable organizational goals. It is a process that involves not only determining where an organization wants and needs to go, but also, how it is going to get there. Determining where you want to take your organization is key. This process also includes personal leadership components all entrepreneurs need to take that key and unlock the door to personal and organizational success!

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# Coaching



The challenge has never been greater! In today's business environment of accelerating change and increasing uncertainty, only leaders who know who they are and where they are going will succeed. Today's leaders must do more than manage change. They must thrive on it!

A leader combines the vision and curiosity of a dreamer with the practical building skills of an architect. A leader is goal directed, looking forward with anticipation toward the attainment of measurable outcome goals. Goals give an effective leader meaning and purpose and serve as a continuous source of motivation in pursuit of organizational and individual success.

To most effectively lead others, consider mastering the art of self-leadership. Working with a Developmental Coach will help you understand who you are and what gives your life value. Coaching will help you to establish your life's purpose and pursue it with confidence, skill, and commitment. Know *where* you are going and *how* you are going to get there!

***“Success is the continuous achievement of your own predetermined goals, stabilized by balance and purified by belief.”***

***“Working with a Developmental Coach will help you understand who you are and what gives your life value.”***

## The Process

This Developmental Coaching process is a structured, open-ended, and pragmatic approach to personal and professional growth. The process is designed to help individuals develop the attitudes, skills, and qualities necessary for personal and organizational leadership.

## Three Essential Elements

### Attitude Development

In order to create an environment of positive attitudes and possibility thinking, it is important for a leader to understand where and how attitudes are formed and how those attitudes can be developed.

### Interpersonal Skills

Much of what a leader is involved in, and therefore accomplishes, involves other people. To be effective in this continuous challenge, it is important to learn, understand, and use interpersonal skills effectively.

### Goal Setting

Leadership, among other things, is the process of providing organizational direction and accomplishing necessary objectives. The goal accomplishment model provides the tools and process necessary to achieve more goals, more often, in order to maximize results and outcomes.

## Critical Issues Covered Within this Process

- The Role of Your Coach
- Strengthen Your Strengths
- Success Comes from Within
- Authority and Power
- Assessing Your Strengths
- Directing Change
- Behavior and Conditioning
- The Value of Mistakes
- Criteria for Effective Goal Setting
- Obstacles to Your Success
- Overcoming Obstacles to Change
- Courage
- Planning with a Purpose
- Delegation and Management
- Communication and Human Relations
- Motivation
- Decision Making and Problem Solving

## The Results are Measurable

- More Control of Your Future
- Increased Revenue
- Increased Profitability
- More Personal Time and Freedom
- A Clear, Focused Direction
- Enhanced Leadership Ability
- Results-Oriented Attitudes
- Developing Your Team
- Creating a Vision for Personal Direction and Decision Making
- Living Your Purpose

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# Customer Loyalty Management Awareness



Making certain that your customers get what they want and come back for more is of critical importance to the long term success of any organization. All factors that impact negatively on the customer (unfriendly policies, processes, untrained employees etc.) must be identified and corrected if you wish to compete most effectively and profitably now and in the future.

To every successful business, having a customer is obviously the most important ingredient. Try conducting a successful business without one.

## Management's Responsibility

As a management team, one of your most critical functions is determining how best to relate to your customers. You must develop appropriate customer-oriented strategies, design and implement customer friendly policies/processes, develop your employees to create and sustain customer relationships, and constantly monitor and continuously improve your progress for the issues that are most important to your customers.

To create loyal customers, an organization needs to provide a positive emotional tie during every Point of Connection (POC) even though it may seem to be a small, insignificant detail. A customer's experience is inherent, a positive experience is not. The customer consciously and unconsciously filters a barrage of impressions at each POC in the form of experiences and organizes them into sets of impressions, some rational and others emotional. Anything perceived or conspicuous by its absence is an impression. If customers can see, smell, taste, or hear it, it is a POC. Product and service providers provide measurable POCs, as does the physical environment in which they are offered. Therefore, in order to effectively manage POCs they first must be identified, and once they are identified, management must clearly understand what value your customer desires.

## Why Would You Want Loyal Customers?

The notion that there is no linkage between customer retention and profitability is being proven false. Recent studies that sought to find a linkage between customer retention and profits have supported the fact that the old notion is false. There is, in fact, a direct linkage between customer retention and profitability.

Even insignificant changes in customer retention rates have resulted in extraordinary improvements in profitability. One survey found that a 5% shift in customer retention consistently resulted in 25-100% profit swings. These almost unbelievable results would suggest that there must be a powerful force, your emotional connection to your customers, which needs to be understood and managed.

So what can you do differently for your business? A good place to start would be to find better ways to create and sustain a loyal customer base, the advantages of which will be enormous to customers, employees, and investors. Strictly from a financial perspective, revenue increases of improved service quality tend to be 10-20 times the costs associated with fixing the problem.

## Measuring Loyal Customers

It can be difficult for an organization to measure the economic value of creating a loyal customer if they only focus on the balance sheet as a means of measuring current and future success. Only considering balance sheet items could lead one to conclude that relationships are irrelevant, and customers should be dealt with based only on what is profitable rather than what is right for the customer. Given this thought process, it is little wonder then that the customer often gets lost in the shuffle. So if profit

is not the only, or even perhaps the best measurement of customer loyalty, what is a better measurement system?

## How to Get Started

During a 2-day workshop with the senior leadership team, you will be able to determine if Customer Loyalty is a strategy needed for your organization.

- Develop a dashboard to maintain management and employee focus
- Create action steps to retain loyal customers
- Develop a methodology to measure employee loyalty
- Examine relationships between customer loyalty and profitability
- Identify core Points of Connection
- Understand if this strategy will help you achieve your strategic objectives

## Results

If a Loyal Customer Strategy is right for your organization and successfully implemented, you could expect:

- Increased profits
- Reduced costs
- Increased employee retention and loyalty
- Improved team culture
- Motivated and productive employees
- Increased future growth potential
- Increased competitive strength

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## **DEVELOPING LEADERS & RAINMAKERS**

In most professional service firms, Partners & Associates are expected to deliver services while simultaneously focusing on creating new business opportunities. Successfully navigating this dual role of being both the “seller” and “deliverer” of services is a difficult challenge.

This process is also used for small business firms requiring the reenergizing of marketing and sales personnel entering and rebounding during economic recovery.

Because today’s buyers are better educated, more informed, and have more options than ever before; continued company growth and individual success now requires innovative ideas and finely-developed business development skills.

If, in fact, the rainmaker role is often viewed as the “lifeblood” of an organization, why is this responsibility typically limited to a select few within the organization? The fact is that as a professional services provider the business development role falls outside the normal sales paradigm. Because the “rainmaker role” combines the sales and service delivery roles; the professional provider is often at odds reconciling between services that are bought based upon talent and knowledge versus services bought based upon self promotion.

Additionally, senior partners and executives within an organization are often faced with the challenge of identifying the “next generation” of proven rainmakers and leaders within their company who will guide the organization into the future while at the same time providing them a safe and secure retirement.

Further, the objective becomes one of cascading rainmaking and leadership responsibility throughout an organization without creating ongoing organizational and employee discomfort.

Whether you represent a well established company or a new start up; one fact remains clear: it is unlikely that you will maintain a competitive advantage unless you approach this challenge in a different way. Leadership success in the world of professional services depends on your ability to reinvent yourself and your process and apply them for improved results consistent to your customers needs, in a way that differentiates your company from the competition

## **A PROCESS BUILT TO ACHIEVE RESULTS**

Unlike other developmental programs, the Rainmaker and Leadership Development program is all about achieving quick results. Utilizing proven methodologies, this development process offers a comprehensive, concise program that will help develop a skilled successful professional that is able to comfortably balance the dual role of seller and provider, based upon individual comfort levels.

By utilizing a personal development system, the professional service provider will uncover a system and action plan that will lead to higher levels of individual and company achievement.

## **Critical Issues Covered Within this Process**

- The Need to Reinvent Yourself
- Understanding The Buying Process Influences
- Building Attitudes for Positive Results
- Defining Your Value Added Proposition
- Discovering the Hidden Objections
- The Role of Goals
- Solution for Every Obstacle
- Referral Sources
- Role of Centers of Influence
- Understanding The Business Funnel
- Developing Communication Skills
- Easily Securing Additional Appointments
- Understanding The Steps of the Professional Sale
- Farming the Client Relationship
- Effective Questioning Techniques
- Building a Case for Action
- Effective Presentations
- Building Winning Proposals

## **The Results are Measurable**

- Increased Revenue, Market Share & Income
- Strengthened Focus on Attracting, Servicing and Keeping Customers
- More Repeat Business Competitive Business Converted
- Future Leaders Clearly Identified
- Improved Competition

# Executive Leadership



Success in today's complex global arena is challenging, and the rules are changing. We can be assured of several things: the challenges facing us today will become even more intense; the speed with which change is occurring will increase; and the competition will intensify.

To create and lead an organization that will maintain a competitive advantage during these turbulent times, many executives will have to transform an organizational culture that was founded on yesterday's paradigms and ideas. Priorities will shift, and thinking will have to change. Attitudes and behaviors reflecting new and different social and organizational values will have to be adapted. For many people, learning to adjust to change will be difficult, and managing change will present even greater challenges. Organizational success will require leadership that is focused on positive results!

## The Process

This Executive Leadership process offers a proven path to help you create an environment in which people will be excited about operationalizing the established vision. It will provide you with the techniques for aligning your resources and guidelines for effectively leading people to higher levels of performance.

***“Your challenge will be to create an organization that will maintain consistent growth and improvement in an environment rife with rapid change.”***

## Critical Issues Covered Within this Process

- The Challenge of Leadership
- Valucship
- Vision
- Dealing with Change
- Organizational Alignment
- Goal Accomplishment
- Effective Planning
- Leadership Responsibility
- Understanding Human Potential
- Collaborating
- Building Teams
- Motivation
- Understanding Behavior
- Building Success Attitudes and Habits
- Communications

## The Results are Measurable

- Increased Market Share
- Maximized Return on Your Intellectual Capital
- Increased Shareholder Earnings
- Strengthened Focus on Attracting, Servicing, and Keeping Customers
- Realized Even Greater Employee Contributions to Results
- Defined Strategic Direction
- Developed and Sustained Corporate Values

## The Formula for Success

**ASK + GOALS = PBC → IR (P)**

|                       |                      |                      |
|-----------------------|----------------------|----------------------|
| <b>A</b><br>ATTITUDE  | <b>P</b><br>POSITIVE | <b>I</b><br>IMPROVED |
| <b>S</b><br>SKILLS    | <b>B</b><br>BEHAVIOR | <b>R</b><br>RESULTS  |
| <b>K</b><br>KNOWLEDGE | <b>C</b><br>CHANGE   |                      |

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# Leadership



There is an over abundance of managers and a huge lack of leaders. This situation clearly has a negative impact on an organization's ability to grow and compete.

A leader combines the vision and curiosity of a dreamer with the practical engineering of a builder. A leader is goal directed, looking forward with anticipation toward the attainment of measurable outcome goals. A leader is a person who sets goals and achieves results. Goals give an effective leader meaning and purpose and serve as a continuous source of motivation in pursuit of organizational and individual success.

While many books have been written about leadership, it remains for many a misunderstood and elusive quality. The capacity for leadership exists in everyone, but most people never take the time to develop it. Leadership is determination, courage, confidence, and the ability to get results!

Positive leadership assumes that goals can be accomplished, the job can be done, the problem can be solved, and the obstacles will be overcome. A leader creates his or her own future and drives the future success of an organization.

*“A leader creates his or her own future and drives the future success of an organization.”*

## The Process

This Leadership Development process is a structured, open-ended pragmatic approach to leadership growth. It is a process designed to help individuals develop the attitudes, skills, and qualities necessary for personal and organizational leadership.

## Three Essential Elements

### Attitude Development:

In order to create an environment of positive attitudes and possibility thinking, it is important for a leader to understand where and how attitudes are formed and how those attitudes can be changed.

### Interpersonal Skills:

Much of what a leader is involved in, and therefore accomplishes, involves other people. To be effective in this continuous challenge it is important to learn, understand, and use interpersonal skills effectively.

### Goal Setting:

Leadership, among other things, is the process of providing organizational direction and accomplishing necessary objectives. The goal accomplishment model provides the tools and process necessary to achieve more goals, more often, in order to maximize results and outcomes.

## Critical Issues Covered Within this Process

- Leadership and You
- Tapping Your Hidden Potential
- Motivation
- Behavior and Conditioning
- Attitude Development
- Personal and Organizational Goal Setting
- Roadblocks to Success
- Creative Power and Visualization
- Managing Your Time
- Communication
- Delegation
- Decision Making and Problem Solving

## The Results are Measurable

- Being More in Control of Your Future
- Increased Revenue
- Increased Profitability
- More Personal Time and Freedom
- A Clear, Focused Direction
- Enhanced Leadership Ability
- Results-Oriented Attitudes
- Developing Your Team
- Creating a Vision for Personal Direction and Decision Making

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# Team Leadership



In today's business, the team leader is the main link between the organization's goals and the people who are responsible for the daily activities that make those goals a reality. Because of the necessary and integral role that this position plays, it is obvious that good team leaders are key to the success of any organization.

Many everyday decisions required within this role affect profits, productivity, service levels as well as attitudes, and morale. With a role and function of this magnitude, it would seem logical that the process of becoming a team leader would require years and years of training. However, most team leaders have had little or no training in the required skills. Almost universally, today's team leaders are men and women who have been promoted from being a superworker to being a team leader.

## A Process for Results

The Team Leadership process makes team leadership development not only possible, but also eminently profitable. Individually, each team leader reflects the proficiency of a specialized knowledge, which creates a powerful force that assures the achievement of organizational goals through its people.

*“Team leadership development is not only possible, but also eminently profitable.”*

## Essential Elements

### Attitude Development:

Attitude is the basis of all individual behavior. The effectiveness of team leaders will depend upon their behavior in a given situation. Improved results and productivity begin by developing the attitudes that govern positive behavior.

### Behavior Management Skills:

Better than 50% of a team leader's time is spent managing other people. To be effective in this role, it is important that the individual develops the skills necessary to effectively communicate and maximize productivity.

### Goal Accomplishment:

A team leader not only sets goals, but also needs to determine how they will be achieved, what obstacles must be overcome in the process, and the timeline necessary. The Team Leadership process provides a proven goal accomplishment model that can be immediately applied to any organization.

## Critical Issues Covered Within this Process

- The Roles and Functions of a Successful Team Leader
- Organizational Goal Setting
- Developing Confidence
- Managing and Controlling Your Use of Time
- Creating and Managing Performance
- Creating an Environment for Growth
- Techniques for Better Training
- Conducting the Evaluation
- Taking Corrective Action
- The Disciplinary Interview
- Decisions, Habits, and Attitudes
- Making Quality Decisions

## The Results are Measurable

- Dynamic Teams
- Lowered Cost of Doing Business
- High Performing Individuals
- Motivation to Accomplish Organizational Goals
- Increased Revenues
- Increased Profitability

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# Management



Over the last several years, management has taken on many new and complex dimensions. Advancing technology, changing values, and increasing competition have created new and exciting possibilities for every organization. The challenge facing management today is developing an organization that can achieve tomorrow's goals while continuing to meet the daily challenges of today's changing business environment. To balance these organizational and economic demands, managers need a systematic, results-oriented approach to organizing, managing, and motivating their people.

Today's management requires the skills to manage people to a higher level of productivity and successful outcomes. Every company and organization is forced to accomplish more with less in this global business environment. Effective managers are a key ingredient for increased profitability and growth for organizations.

## The Process

The Management Development process is designed to help managers develop the skills needed to do more with less and be able to aggressively accomplish organizational and personal goals and objectives. As a result of this process, managers understand why and how they can be essential to achieving the organization's goals. This process makes management development not only possible, but eminently profitable.

*“Effective managers are a key ingredient for increased profitability and growth for organizations.”*

## Critical Issues Covered Within this Process

- Manager as a Leader
- Criteria for Goal Setting
- Order of Values
- Solutions and Action Steps
- Confidence
- Attitude Motivation
- Transactional Analysis
- Active Listening
- Timing and Decisions
- Communication
- Making the Most of Your Time
- Subordinate Development
- Creating a Problem Solving Environment
- Managing Through Goal Setting
- Project Management

## The Results are Measurable

- Cohesive, Energized Teams
- Reduced Turnover
- Improved Organizational Profits
- Developed and Sustained Corporate Values
- Professional Expectations Accomplished
- Increased Market Share
- Increased Productivity
- Development of Positive Attitudes and Vision
- Highly Functioning and Performing Teams

## The Formula for Success

**ASK + GOALS = PBC → IR(!)**

|                  |                 |                 |
|------------------|-----------------|-----------------|
| <b>ATTITUDE</b>  | <b>POSITIVE</b> | <b>IMPROVED</b> |
| <b>SKILLS</b>    | <b>BEHAVIOR</b> | <b>RESULTS</b>  |
| <b>KNOWLEDGE</b> | <b>CHANGE</b>   |                 |

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# Sales



The field of sales has experienced some dramatic and far-reaching changes over recent years. Today's sales professionals, as well as today's buyers are better educated, more informed, and have more options than ever before. These changes have created new, exciting, and challenging possibilities in every organization. Success requires innovative ideas and finely developed skills.

Whether you are selling a product or service, whether you represent a well known, established company or a new start up, one fact remains clear: It is unlikely that you will maintain a competitive advantage unless you discontinue doing things the way you have always done them.

Success in the world of sales depends on your ability to reinvent yourself and your processes and apply them for improved results consistent to your customer's needs.

## The Process

The Sales Development process offers a comprehensive, concise process that will help develop a skilled, successful sales professional. By uniting current sales skills with a personal development system, a sales professional will uncover a system that will lead to higher levels of achievement.

## Critical Issues Covered Within this Process

- The Need to Reinvent Yourself
- The Buying Process
- Building Attitudes for Positive Results
- Resistance to Change
- Prospecting
- The Role of Goals
- A Solution for Every Obstacle
- Referral Sources
- Center of Influence
- The Sales Funnel
- Communication Skills
- Appointments
- The Steps of the Sale
- Effective Questioning Techniques
- Building a Case for Action
- Effective Presentations
- Proposals

## The Results are Measurable

- Increased Sales
- Increased Market Share
- Strengthened Focus on Attracting, Servicing, and Keeping Customers
- More Repeat Business
- Increased Share of Wallet
- Competitive Business Converted
- Increased Income
- Higher Profits for You and Your Company
- Maximized Balance Between Business and Personal Life

## The Formula for Success

$$\text{ASK} + \text{GOALS} = \text{PBC} \rightarrow \text{IR}(\%)$$

|                  |                 |                 |
|------------------|-----------------|-----------------|
| <b>ATTITUDE</b>  | <b>POSITIVE</b> | <b>IMPROVED</b> |
| <b>SKILLS</b>    | <b>BEHAVIOR</b> | <b>RESULTS</b>  |
| <b>KNOWLEDGE</b> | <b>CHANGE</b>   |                 |

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*“The field of sales has experienced some dramatic and far-reaching changes over the years.”*

# Strategic Planning



The best way to predict the future is to create it! Strategic Planning is a process that determines the future of the organization and what organizational resources will be needed to ensure that success. The process helps determine business opportunities and resources that are required to convert opportunity into success.

Business owners and leaders today have found that developing a strategy and an implementation plan is far more effective than leaving the future to chance. Furthermore, developing a strategy, a vision, a mission, and a specific plan of action contributes to long-term, sustainable success. If implemented correctly, it will create higher levels of motivation and commitment, and fuel continuously higher levels of achievement from everyone within the organization.

## Developing the Plan

The Strategic Planning process provides a format for developing specific strategies, converting those strategies into a business planning process, and establishing measurable and attainable organizational goals. It is a process that involves not only determining where an organization wants and needs to go, but also, how it is going to get there.

## Steps For Planning An Effective Process

- Basic Foundation
- Business Philosophy
- Vision Statement
- Values and Principles
- Vision
- External Assessment
- Competitive and Trend Analysis
- Internal Appraisal
- S.L.O.T. Analysis
- Mission Statement
- Critical Goal Categories
- Organizational Goals
- Market and Sales Plan
- Implementation

## The Results are Measurable

- Increased Market Share
- Maximized Return on Your Intellectual Capital
- Increased Shareholder Earnings
- Strengthened Focus on Attracting, Servicing, and Keeping Customers
- Greater Employee Contributions to Results Realized
- Defined Strategic Direction
- Corporate Values Developed and Sustained
- Motivated Employees
- Resources Allocated
- Success Defined
- Teams Created
- Guidelines for Delegation and Decision Making Provided
- Pro-Active Management Promoted
- Trends and Technologies Identified
- Sense of Purpose Created

## The Formula for Success

**ASK + GOALS = PBC → IR (!)**

|                  |                 |                 |
|------------------|-----------------|-----------------|
| <b>ATTITUDE</b>  | <b>POSITIVE</b> | <b>IMPROVED</b> |
| <b>SKILLS</b>    | <b>BEHAVIOR</b> | <b>RESULTS</b>  |
| <b>KNOWLEDGE</b> | <b>CHANGE</b>   |                 |

## Contact Information

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*“The effective implementation of the strategic plan is the true determining factor as to whether or not a company is effective.”*