

A Few Testimonials and Case Studies from the *OptimizeHow* Alliance

"It is rare to find a business advisor who combines a dispassionate advocacy of number crunching with a passionate belief in executive accountability, applied systems and personal growth. Linnea Blair is just that person, and more. Her fans are numerous and vocal in their appreciation. I, for one, could never have imagined that after 3 years in On Target my company would grow 300% and enjoy not just increased profitability but also its evolution into a mature and highly regarded professional painting company." --
President, JRB Professional Services



Neopost USA

Topsail did a great job developing a value proposition with me and my leadership team at Neopost USA. Steve and Alex have that valuable blend of theoretical and practical application that yields lively discussions and productive outcomes. A portion of their success with Neopost USA can be attributed to their work plan, which involved learning our business and understanding the personalities of the leadership team.
Dennis P. LeStrange, President and CEO, Neopost USA

During the course of the last two years, we have utilized Agiledge and Alan's talents many times and for many different purposes. He has assisted our organization in strategic planning, management teambuilding sessions, employee profiling, employee problems and staffing. Alan's input has been invaluable. He possesses a rare blend of interpersonal skills as well as analytical skills. He has also exhibited outstanding mediation skills in highly critical situations with employees. And his availability to our team on short notice is highly commendable. We have come to depend on Alan and feel he is part of our team. He has been a real asset to the growth of our organization and I highly recommend...

Chuck Saathoff, President, Worldtrans San Diego, CA

"There is a lot to like about Advisor's On Target 10 week intensive "Chart Your Course to Business Success" by Linnea Blair. In particular, the homework assignments are key to being proactive in developing you business plan. I found Linnea's presentation to be thought provoking, insightful, and chock-full of useful knowledge towards business development. In addition, to listen and learn from peers in the business to always useful. I would highly recommend this course to any small business owner looking for a key to success." -- Kerry Tarlov, San Diego, CA



Henkel North America

Topsail Group created a unique environment to help us further develop our branding initiative in North America. We are on the threshold of revitalizing all of our brands and concentrating on global alignment. Topsail Group provided valuable ideas and a blueprint on how to proceed.

-- Michael Quail, VP, Marketing Henkel Technologies, Henkel NA

"If an organization from top management down to team leaders actively participates in the program... , Agiledge's program facilitates significant organizational behavioral changes. ... the program is uniquely structured to improve the retention of training. I look forward to attending the sessions in the future and using the tools provided to help us reach our goals."

-- Mark McWilliams, Medication Delivery Devices – San Diego

"I have been attending Linnea's small business coaching for about 8 months now. We meet once a month for 90 minutes. The members of the group come from a variety of business sectors, with Linnea moderating the meetings. Any member can bring an idea for the group to give feedback, and we provide each other support. It's like having your own board of directors. Linnea is fabulous in giving you feedback, suggestions, and follow up with you to make sure you are accomplishing your goals for the month. Linnea, and the group, has given me the confidence to hire a new employee and grow my business as a result. Linnea is an awesome business coach and I look forward to a continued relationship with her!" -- Nigel Costoloe, Catchlight, Inc



SMARTANALYST, Inc

Topsail Group made great suggestions on the best way to facilitate and insightful discussion between a powerful team of business development executives and business analysts. They provided a comprehensive framework and approach to considering who, how, and what our clients think as we're engaging in the consultative sales and delivery process. They also encapsulated and communicated the stuff that I thought was raw instinct for only the very best relationship builders. This was a superb team building and team engagement session. -- Steve Girling, Managing Director, SMARTANALYST, Inc



mcgarrybowen

Role: Account Management Skills Training

"The fact that both Steve and Alex have agency and client-side experience was instrumental to relating the information to our needs."

"The workshop was most successful because the consultants have deep-rooted experience and many examples to share."

"I enjoyed asking questions about my current circumstance and listening to the advice of the consultants."

"The personality profiling of clients was the most worthwhile. I enjoyed the listening demonstration the best."

Quotes from the participants taken from their formal evaluation of the Workshop.

"Implementing your program (AGILEEDGE) has proven to be a catalyst for improving not only the skills of our organization but also the attitudes and culture of our people. Our people are now dealing more effectively with each other, working more productively and contributing more individually and as members of our business team." Bill Davis, Sundance, San Diego

On Target has been THE key to our ongoing success at Peek Brothers Painting Contractors. With professional coaching and encouragement, I have not just learned new things but have implemented them as well so that we have grown in profitability. I enjoy and am encouraged on a monthly basis by our 1 ½ hour phone gatherings...I get to talk with other like-minded contractors in my group about what they are doing...what works and what doesn't work for them, so that I am not reinventing the wheel. The fact that we are all on the same bookkeeping system really helps as we compare our businesses and help one another to stay "on target". Our twice yearly, two day gatherings, give me the encouragement of "face time" to have a deep learning experience as well as time to discuss things with the entire group and one-on-one. I have made some great friends for life who look out for my success as I do for them! Another very key benefit is the 12 hours of direct time with my coach, Linnea Blair, who has come to know me and my business on a deep level and whose counsel I always find invaluable. Recently our group had a "Shop Hop" where we took a few days to visit five member shops in two days...it gave us all great insight to see in person how each contractor set up his/her office and shop. I strongly encourage you to join us...your profits will grow as you grow personally! -- Michael Chism, San Diego, CA

"Thank you for sharing your time and expertise with our business alliance group. Your presentation was excellent and I hope it inspired everyone to put together a formal business plan." --John Peek, San Diego, CA

TopSail Case Study: Customer audits & feedback surveys: the roadmap to improving customer satisfaction and repeat business

The Scenario:

A rapidly growing and expanding global research firm wanted to obtain customer feedback and gauge the level of customer satisfaction of current key clients. This would encompass the total experiences with the firm --- from the initial sales call, to defining the scope of the research, to addressing the client's objectives, and finally to the presentation of the final deliverable. The key objectives were: to evaluate the overall quality of the firm's relationship with the client; to identify ways to improve the levels of service; to determine the slope of the relationship over time --- whether it was improving or declining; to identify specific areas and issues upon which to focus remedial action; and finally, to enhance the consistency of client service over time and build repeat revenues.

Solution:

Topsail Group was asked to help to design these customer audit and feedback surveys, conduct a beta-test with a few clients to make sure they were properly implemented. After initial learning these surveys were conducted on a larger scale in the United States and abroad. Topsail then compiled the information and presented findings and recommendations to the senior management team. These customer feedback surveys were more of a qualitative rather than quantitative document and this was by design. For some of the questions, clients were asked to rate key statements of the firm's performance on a five point scale, whereas at other times, there were open-ended and direct questions. Based on geography, costs, and timing, some of the surveys were conducted in the client office with Topsail Group and the client during one-on-one interviews while others were done over the telephone.

Results:

Based on these surveys, the firm was able to obtain strategic and valuable, insightful information and feedback in order to help improve customer satisfaction, repeat business, and loyalty. Most of the feedback was very positive, with generally good marks for enthusiasm, responsiveness to client needs, and the overall desire to really help clients with their objectives. Some feedback was not totally positive. Most importantly, these surveys articulated very important and specific recommendations for improvement; for example, the need to continually clarify, agree, and communicate project objectives, scope, and status throughout the entire engagement, including the final presentation. Acting upon Topsail's findings and recommendations, the senior management team assigned a cross-section of employees into teams to solve these issues and make changes in the entire client engagement process.



Salans Law Firm

Today, law firms have to look at branding to help their business. Salans is an international law firm and we are no exception. Topsail Group provided insightful and sound advice on our Internal and External Branding issues. I highly recommend them for their experience, creativity, and service.

George T. Heath

Director of Professional Resources, Salans Law Firm

"I have now worked with Linnea Blair with Advisors On Target for over 5 years and am actually a charter member. Working with Linnea has been my college education. She has helped me to understand the business side of contracting, especially when it comes to knowing your numbers. This was not a natural thing for me to learn, yet she makes it easy to understand and to get control of through using their well-designed templates, tracking, and benchmarking. I really enjoy the camaraderie and learning with my peers. It has made it a lot more comfortable for me. The peer groups have also been my accountability. I have really enjoyed this process of learning about my business."

-- Rama Beerfas, San Diego, CA

"I wanted to write this letter to let you know how useful the Agiledge sessions have been for our company. We have been able to implement them with our managers and teams and are pleased to see that the training has made a positive impact with our organization. Most importantly the training is well suited for all manager titles and most of the training can be parlayed to the employee level. Thank you for a year of insightful information, personal and career growth."

Dasha Samarin-Hervey, General Manager, TriStaff



Remy Cointreau USA

Remy Cointreau USA is going through an extraordinary transformation. Our engaged, motivated employees are our biggest asset to help us navigate these changes. Topsail did an outstanding job of getting our newly designed Field Marketing Organization aligned around their mission, strategy, and pledge to one another and value to the greater organization. Topsail was able to take us to a whole new level of teamwork.

Marie Mann, Senior Vice President, HR



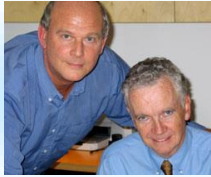
Whitaker Center

Topsail brought our Whitaker Center executive team to a higher level of performance. We were able to enthusiastically create several new business building programs that we had never seen before. We are now far more collaborative and productive. Topsail's preparation was extensive and they helped to provide many relevant insights.

Byron Quann, President & CEO, Whitaker Center

"On Target has helped me refocus on my business in ways I could not do by myself. Clarity on my priorities is priceless. I highly recommend participation in this excellent resource. An increased understanding now of budget and realized revenue will aid me greatly not only in my two contracting companies, but in my other business endeavors."

-- Joshua Abramson, Valencia, CA



Cossette Post Communications

Role: Presenting and Communications Skills

We are in the persuasion and presentation business. It is important to realize that many skills are forgotten over time and continually need reinforcement. Topsail Group makes the learning of presenting skills fun and exciting. Our people are still talking about it.

Peter Post, CEO, Cossette Post Communications

"As a new-comer to the On Target group (and the industry), Linnea has been wonderful with getting me acquainted with how the program works. What once seemed a daunting task at the end of each month has now become part of my routine now that I understand the Financial Management tools and how they all work together."

-- Non Profit Executive Director, San Diego, CA



LM&O

"Topsail conducted a workshop for our account management team. After the team training, the session was quite the buzz here. Everyone picked up a lot of relevant learning; references to "sails" etc. are heard in casual conversations around the office. Seems everyone thought it was time very well spent. It gave just the boost to account management that I was looking for."

Doug Laughlin, President, LM&O

TopSail Case Study: Creating a value proposition and a brand for the Company

The Scenario:

The USA Division of a French company undergoing many changes in leadership, operations, and people due primarily to the recent merger of two separately named companies and the shared services division into one common organization. A recent company-wide Employee Engagement

Study and follow-up focus groups with employees indicated the following areas as weaknesses that needed to be improved upon: lack of alignment and goals, lack of communication, process improvement, lack of employee recognition, need more learning, training and development, and the lack of accountability. In order to help make these improvements and change the corporate culture throughout the company, the CEO decided a new value proposition was required.

Solution:

Topsail Group created a customized Internal Branding Program to address and help solve the challenges facing this newly reorganized company. It helped to integrate and align employee behavior with the company's new direction. This included individual interviews, pre-workshop assignments, workshops with the Executive Team and a cross section of employees. Topsail was able to facilitate key answers to "Who we are? What do we stand for? Where are we going?" This led to: 1) the creation of a New Value Proposition along with new, supportive key employee behaviors that were incorporated into job descriptions, performance reviews, and MBOs 2) a new Rallying Cry, 3) a variety of Kick-off Activities, including a company-wide video of the CEO and VP/HR launching the Program, 4) Value Proposition Handbook distributed to each employee, 5) Bi-monthly Internal Branding Newsletter with articles dedicated to the Program, 6) Environmental Branding through the offices including kiosks representing key program elements, 7) the selection and training of Brand Ambassadors to continue employee engagement, training, and development with quarterly workshops for all employees.

Results:

Employees were informed, motivated, trained, and given the tools in order to buy-in and understand what was expected of them. The Internal Branding Program helped to build teams of dedicated, aligned, and engaged employees to help improve overall company and employee performance. A company-wide Employee Engagement Survey was conducted during 2010 to help evaluate the positive role of Topsail Group's Internal Branding Program. The results were impressive: (Pre) Employee Engagement Survey Score = 45%; (Post) Employee Engagement Survey Score = 61% --- an increase of +36%. The company was very pleased with the results.

TopSail Case Study: A premium company that delivered inferior customer service

The Scenario:

The USA Division of a European company offering high quality, premium products realized it needed to improve its lackluster customer service since it was not in keeping with the premium-ness of the company. The CEO was extremely frustrated since it was affecting the image of the company. There was a rising trend of increasing customer complaints, missed deadlines for the shipment and delivery of products, too many financial credits given back to customers for the company's poor service performance, and the growing acknowledgement of creating customer ill will.

Solution:

Topsail Group conducted an audit of the Customer Service Department to mainly concentrate on identifying its weaknesses and shortcomings. This included individual interviews with select customers, customer service managers, and other representatives of functions that were impacted by customer service actions --- such accounts receivable, accounts payable, and the sales force. Topsail Group conducted cross-functional workshop sessions and also monitored customer service representative in their daily functional activities, procedures, and responses to customer calls, inquiries, and complaints. It was determined that there were four key problems: no clearly articulated specific procedures to address key customer issues; the same problems and issues were re-occurring on a weekly or daily basis; activity seemed to focus on the symptoms and not the underlying problems; and lastly there was no clearly defined, centralized collection for important customer and company information. Topsail Group was charged to help redefine and redirect the entire customer service function. Topsail created, trained, and implemented "Customer Services Best Practices" by focusing on customer-centric doctrine and improving operational, technical, communication, and people skills. Through its comprehensive, hands-on Customer Service Training Handbook and workshops, Topsail successfully incorporated 1) centralized, pertinent information, facts, and where to find things, 2) identified Top 10 problems/issues with specific solutions, and 3) tutorial and training on effective people, technical, and communication skills.

Results:

The customer service department was overhauled to reflect the findings. Overall customer complaints have been drastically reduced, the proper and timely shipment and delivery of products have become the norm, and there was a greater team approach among cross-functional departments to solve problems permanently. The President of the company has stated that he “now hardly hears of any customer service problems.”

TopSail Case Study: How to handle very important but difficult internal clients

The Scenario:

In the mind of his boss, the operations manager of a large global shipping company had the basics of his job down and had good general managerial skills; but he needed to raise his game to a new level. His role was to satisfy strong internal clients (The Chartering Group) with strong personalities who knew the technicalities of his job at least as well as he did. This manager had a mixture of experts and novices reporting to him; but the internal clients were all considered experts with many years of experience. He was too immersed in the detail and not “10,000 foot enough”. His boss wanted a different mindset; to be ahead and prevent problems from developing rather than to just fix them. Topsail was asked to concentrate on the following issues: dealing with tough personalities, time management, prioritization and delegation. In the past he was getting the job done quickly; now he needed to raise his head and see what the company needed and translate that, into instructions for his team. Net, he needed to think bigger.

Solution:

In addition to a full scope of training in the areas assigned, Topsail sought to deeply understand the personalities of the Operating Executive, his team and his internal clients. After administering the Topsail Personality Profile (TPP) to the entire group, in-depth one-on-one interviews were conducted with all of the participants. Finally joint sessions were held with the Operating Executive and his clients in the same room to candidly vent the problems. Interestingly the Executive did very well in these sessions showing a stronger side of his style. These sessions helped both sides establish some common ground and respect, but it was clear the internal clients had an inflated opinion of their abilities and were very difficult to get along with. Topsail concentrated on persuasion skills and followed them up with interactive drills to further drive in the techniques. Other subjects that were covered in this 6 month Executive Coaching program were: leadership styles, effective listening and engagement, priorities and time management, influencing, problem solving, role playing, talking and presentation skills, leveraging trust and credibility, teamwork and delegating.

Results:

Executive is functioning at a higher level, his clients are meeting with him more frequently in structured staff meetings and engaged projects. He has more respect from his clients and is methodically training his team. The Executive creates a grid every single day to better prioritize his day; this may seem simple but in managing all the company ships conducting commerce in the Atlantic Ocean there are many issues to consider: safety, cost, efficiency, long voyages, crew issues, loading and unloading and individual regulations in each port are a few of these.