

# Strategic Career Preparation Package

## *The Internship Program*

**“Rapid, Fluid, Succinct”**

*Because... Only The Most Organized, Most Focused, Most Prepared...  
Will Consistently PREVAIL! - Sun Tzu (The Art of War - 500 BC)*



STRATEGIC  
PERFORMANCE  
INSTITUTE



**Strategic Performance Institute**

25502 Saddle Rock Place

Laguna Hills, CA 92653

(949) 233-5566

Pete@StrategicPlanning.com

[www.PeerAdvisoryForum.com](http://www.PeerAdvisoryForum.com)

Strategic Internship Candidate,

Thank you for your interest in the Strategic Performance Institute Strategic Career Preparation Internship Program. With the increased volume of highly educated college and university graduates entering the workforce every year, demonstrating a comparative competitive advantage can become a critical game-changer.

Since initiating the Strategic Career Preparation Internship Program back in 2015 we've been instrumental in "pro-actively" coordinating job interview strategies for more than three dozen graduates to date. In every case, each Intern was able to secure their career job of choice despite apparent limitations in prior job experience. The key characteristic to this success was the unique level conspicuous preparation for every component of the job interview cycle.

The Mission: To demonstrate "The Most Organized, Most Focused, Most Prepared" in direct comparison to every interview candidate to date. We're here to help.

In the Spirit of Continuous Growth and Learning.

*Dr. Pete Johnson*

Dr. Pete Johnson

The Strategic Performance Institute



## **“STRATEGIC CAREER PREPARATION” THE INTERNSHIP PROGRAM**

**Our Mission:** *To provide extensive “Real-World”, hands-on business experience to an elite selection of college students that demonstrate unparalleled passion, dedication and a sound strategic work ethic for achieving high-level career goals through augmented academic learning.*

### **“Growing Your Future... What’s Your Plan?”**

- ♦ A “Real-World” Working Strategic Career Plan Focused on Growing Your Future with Monthly Hard-Copy Updates to Measure and Validate Your Forward Progress-On-Plan.
- ♦ Monthly “In-Depth” 1:1 Strategy Review Sessions to Rapidly Incorporate Shifts and Changes in Progress.
- ♦ Monthly Peer Advisory Forum Focus-Group Meetings to Address Critical Issues and Provide Collaborative Input.
- ♦ Strategic Marketing and Branding Support Team to Provide Immediate Assistance in an As-Needed Timeframe.
- ♦ Job Interview Strategy and Plan Providing a Competitive Advantage Despite Limited Job Experience.

**KAIZEN - The Relentless Pursuit of Continuous Innovation and Improvement.**

### **Special Invitation “Monthly Meeting”**

**10:30 a.m. - 2:30 p.m.  
2nd Friday of the Month**

**Dr. Pete Johnson  
25502 Saddle Rock Place  
Laguna Hills, CA 92653**

**1:1 Monthly Meetings  
As Per Schedule**

**RSVP: By Email Today  
[Pete@StrategicPlanning.com](mailto:Pete@StrategicPlanning.com)**



Dr. Pete Johnson  
Strategic Analyst  
Peer Advisory Forum

### **A Unique Concept...**

- ♦ So Much More Than Just Another Internship Experience Focused Exposure to a Particular Job or Function.
- ♦ Hard-Copy of Your Updated “Working” Strategic Career Plan provided to all Program Participants at the start of each monthly Training and Career Development Meeting.
- ♦ Because Measurable RESULTS are the Name of the Game.

**Don’t Tell Me, Show Me!**



**PAF - ABOUT US**

**“Strategic Career Preparation” - The Internship Program**  
**The Strategic Performance Institute**  
**Laguna Hills, CA**

**Our Mission:** To provide extensive “Real-World”, hands-on business experience to an elite selection of college students that demonstrate unparalleled passion, dedication and a sound strategic work ethic for achieving high-level career goals through augmented academic learning.

**The Program:** Participate in an elite Team of well-trained fellow Interns assisting in the coordination of Strategic Planning Consulting Sessions incorporating a very advanced, streamlined Rapid Strategic Execution System. All Interns undergo the same level of Strategic Career Planning and rapid execution as our business clients through extensive hands-on training and education.

This is not a case study exercises but actual real-world strategy focused on business growth, start-up, marketing, strategic research / analysis, financial performance forecasting / evaluation and much more.

The SPI Intern Team ranges from 6 to 12 Interns in “The Program” at any one time depending on Intern Semester Schedules and SPI time availability. Interns are expected to participate for a minimum of 3 months, HOWEVER... most of our Interns choose to stay in The Program through graduation and beyond until they achieve their career job of choice which is precisely what The Program is designed for.

Interns are coached and mentored through all facets of strategic career planning and execution while in The Program as well as after Program graduation. Their performance is reviewed and analyzed monthly with personal strategic guidance provided throughout their involvement. The final phase of training is focused on a unique job interview strategy helping the Intern demonstrate their value as one of “The Most Organized, Most Focused, Most Prepared” of any job candidate by direct comparison.

We take our responsibility to our selected Interns and The Program very seriously. They are taught career skills and a professional mindset from the moment they enter The Program. Throughout The Program they work hand-in-hand with seasoned business owners from a broad range of industries.

The Program complies with and exceeds all requirements for the California Internship Guidelines.

Intern’s Time Involvement: Typically, 4 hour blocks of time at least 2 times per week from 11:00 am to 3:00 pm. Friday’s are the highest priority as they participate in our monthly Peer Advisory Forum Membership Meeting.

**Key Elements of The Program:**

- \* Professional / Personal Branding, \* Meeting Attendance Strategy
- \* Strategic Career Planning, \* Competitive Business Competencies Development
- \* Competitive Job Interview Strategy, \* Pre-Meeting Strategic Due Diligence Analysis
- \* Target Market Research and Analysis, \* Rapid Strategic Execution as a Competitive Advantage
- \* Job Performance Review Strategy, \* Personal / Professional Development Strategy

And Much, Much More...

**A Verifiable Proven Track Record of Success:**

Past Internship Program Graduates’ Contact Information Available Upon Request.





## A Verifiable Proven Track-Record

Kaizen

E	Total Interns	Major / Graduate	Location	Joined	Final	A	B	C	D	Cell #	Email	Origin
1	Fiona Tang	Marketing - 5/2017	Santa Monica	10/01/15	07/21/17						Available Upon Request	CSUF
2	Andrew Manliguez	Marketing -	Santa Monica	10/01/15	05/21/16						Available Upon Request	CSUF
3	Jon Maher	Marketing - 5/2016		01/01/16	05/21/16						Available Upon Request	CSUF
4	Devin Masterson	Marketing - 5/2016		01/01/16	05/21/16						Available Upon Request	CSUF
5	Vitor Choi	Intl. Bus. -	Brazil	01/02/16	01/25/16						Available Upon Request	CSUF
6	Brian Humphreys	Marketing - 12/2018	Torrance	02/09/16	05/24/19						Available Upon Request	CSUF
7	Neo Rochlen	Supply Chn. -	Torrance	03/01/16	06/15/17						Available Upon Request	CSUF
8	Ryan Tamashiro	Finance - 12/2016		06/01/16	03/17/17						Available Upon Request	CSUF
9	Tevin Trujillo	Marketing - 12/2017		03/16/17	06/15/18						Available Upon Request	CSUF
10	Brandon Poore	Finance - 5/2016		03/26/17	09/08/17						Available Upon Request	CSUF
11	Alex Vasquez	Marketing - 12/2018	Whittier	03/29/17	08/25/19						Available Upon Request	CSUF
12	Alejandro (AJ) Vaca	Entrep. - 5/2018		04/28/17	05/01/18						Available Upon Request	CSUF
13	Rene Rojano	Marketing - 5/2018	Fullerton	06/07/17	06/15/18						Available Upon Request	CSUF
14	Kien Bui	Operatns. - 5/2019		06/08/17	12/15/17						Available Upon Request	CSUF
15	Yumi Liang	Intl. Bus - 5/2018	Los Angeles	08/25/17	06/15/18						Available Upon Request	CSUF
16	Jonathan Nguyen	Marketing - 12/2017		09/08/17	12/15/17						Available Upon Request	CSUF
17	Sokunthea Mao	Marketing - 12/2018	Santa Ana	11/03/17	05/24/19						Available Upon Request	CSUF
18	Chloe Cao	Hospitality - 5/2018	China	03/16/18	06/05/18						Available Upon Request	CSUF
19	Josh Aceves	Ace Construction	Anaheim	12/20/18	08/25/19						Available Upon Request	Mike A.
20	Sarah Hertzberg	Marketing - 5/2020	Orange	02/05/19	07/01/20						Available Upon Request	Chapman
21	Phong Duc Tieu	Accounting - 12/2020	Diamond Bar	03/21/19	-						Available Upon Request	CSUF
22	Brett Howard	Insurance KO	Lake Forest	04/01/19	05/15/19						Available Upon Request	Frank G.
23	Nick Herbert	Marketing - 5/2019	Yorba Linda	04/04/19	-						Available Upon Request	CSUF
24	Kai Iseda	Entrep - 9/2020	Huntington B.	04/09/19	08/25/19						Available Upon Request	CSUF
25	Miguel Ponce	Business - 12/2019	Newport B.	04/09/19	-						Available Upon Request	CSUF
26	Daniel Cazares	Entrep - 5/2018	Newport B.	04/09/19	-						Available Upon Request	CSUF
27	Johanes Weniger	Web - 9/2019	Fullerton	04/09/19	05/31/19						Available Upon Request	CSUF
28	Angel Mendoza	Finance- 5/2019	Garden Grove	05/31/19							Available Upon Request	CSUF
29	Jessica Brownfield	Criminal Justice - 5/2020	Fullerton	08/23/19	03/24/20						Available Upon Request	CSUF
30	Mike Chen	Data Science - 5/2020	Los Angeles	09/08/19	03/24/20						Available Upon Request	USC
31	Nick Hatanaka	Marketing - 5/2017	Laguna Hills	09/09/19	02/24/20						Available Upon Request	CSUF
32	Keqin Cai	Business - 5/2021	Irvine	10/17/19	03/24/20						Available Upon Request	CSUF
33	Huy Phan	Entrep - 5/2018	Corona	10/28/19	03/24/20						Available Upon Request	CSUF
34	Caleb Sachs	Marketing - 5/2020	Costa Mesa	07/24/20							Available Upon Request	CSUF
35	Jennifer Icaro	Marketing - 8/2021	Bellflower	08/31/20	06/01/21						Available Upon Request	CSUF
36	Brandon Kessler	Marketing - 5/2021	Irvine	08/31/20	06/01/21						Available Upon Request	CSUF
37	Maxwell Boscardin	Marketing - 12/2021	Laguna Niguel	08/31/20							Available Upon Request	CSUF
38	Thomas Park	Marketing - 5/2021	Corona	08/31/20	06/03/21						Available Upon Request	CSUF
39	Maria Macias	Marketing - 5/2021	Santa Barbara	08/31/20	06/04/21						Available Upon Request	CSUF
40	Leon Phung	Marketing - 12/2021	Midway City	09/07/20							Available Upon Request	CSUF
41	Evan Carol	Risk Mgt. - 5/2021	Villa Park	09/07/20	06/06/21						Available Upon Request	CSUF
42	Josh Low	Marketing - 12/2020	Pleasanton	10/12/20	06/07/21						Available Upon Request	CSUF
43	Billy Sereyvuth	Marketing - 5/2021	Santa Ana	10/18/20	06/08/21						Available Upon Request	CSUF
44	Sharon Hyun	Marketing - 5/2021	La Palma	12/11/20	06/09/21						Available Upon Request	CSUF
45	Ivan Aragon	Marketing - 5/2021	Stanton	12/11/20	06/10/21						Available Upon Request	CSUF
46	Sharon Hyun	Marketing - 5/2021	La Palma	12/11/20	06/11/21						Available Upon Request	CSUF
47	Maria Pareja	Marketing - 12/2022	Huntington B.	03/01/21							Available Upon Request	CSUF
48	Huong Hoang	Marketing - 5/2022	Garden Grove	03/30/21							Available Upon Request	CSUF
49	Freddy Solis	Marketing - 12/2021	Bell Gardens	04/19/21							Available Upon Request	CSUF
50												
XX												

## The SPI Internship Program





# Internship Decision Evaluation

Kaizen

Name: \_\_\_\_\_

Date: \_\_\_\_\_

School / Major: \_\_\_\_\_

Graduate: \_\_\_\_\_

No:	Internship Comparables	Location / Dates				
A						
B						
C						
No:	Evaluation Criteria	Your Prity.	A	B	C	D
01	Resumes Future Prestige-Value					
02	Caliber of Team Interact With Daily					
03	Level of Valuable Network Contacts Developed					
04	Competitive Career Advancement Skills					
05	Mentoring Value					
06	Head Start Toward Your Targeted Career Direction					
07	Job Potential Immediately Following Graduation					
07	Location - Commute Distance					
09	Time Requirements					
10	Pay / Compensation Package					
11						
12						
Totl.	Rating Scale: 10 - 1      RATING TOTALS:		0	0	0	0



## The SPI Internship Program





<div></div> <div>Intern Interview - Key Questions Checklist</div> <div><div>Kaizen</div><div>Date: _____</div></div>			
No:	Key Questions	X	Comments
1	Resume, LinkedIn Profile? (PDR)		
2	Your Major, Graduation Date, Location?		
3	Post Graduate Career Goals?		
4	Hobbies, Interests?		
5	Current Schedule - Job, School - Availability?		
6	Current Business Experience?		
7	Past Internship Programs, Experience?		
8	School Association Affiliations?		
9	Favorite School Courses to Date, Why?		
10	Website Development Expertise, Experience?		
11	Your Career Plan for the Future?		
12	Your Future Schedule Availability?		
13	If we were to work together, what would you see as our next step moving forward?		

## The SPI Internship Program







# CHAPMAN UNIVERSITY

## Internship Site Approval Form

### Student Intern Information

First Name Sarah Last Name [REDACTED]  
 ID [REDACTED] Phone [REDACTED] Chapman Email [REDACTED]  
 Term Spring Year 2019 Subject COM Course # 490 Credits (0.5-6) 4.5

### Internship Site Information

Site Name Johnson Phone 9492335566  
 Address [REDACTED] City Santa Ana State CA Zip Code 92705

### Site Supervisor Information

Supervisor Name Johnson, Pete Supervisor Title Founder  
 Supervisor Email pete@strategicplanning.com

### Internship Position Information

Start Date 2/4/2019 End Date 5/16/2019 Hours Per Week 12  
 Total Hours 180 Compensation ☐ Paid ☒ Unpaid ☐ Other

### Position Responsibilities and Tasks

data capture, logistics, marketing, consulting, networking

### Training and Resources Provided by the Site

networking, training in data capture

### Frequency, Mode and Method of Supervision/Feedback from Site Supervisor

one to one meetings of career plan

### Internship Site Agreement *To be completed by Site Supervisor*

Internship Site agrees to the above described job responsibilities and will provide training and consultation in order to achieve the described objectives. Consistent with the learning objectives, the Internship Site will provide an orientation concerning organizational policies and procedures, meet with the Student Intern regularly and, using forms provided by the University at the end of the term, provide a written evaluation of the Student Intern. The Internship Site agrees to promptly and thoroughly investigate any complaint by a Student Intern of unlawful discrimination or harassment involving employees or agents of the Internship Site, to take prompt and remedial action when discrimination or harassment is found to have occurred, and to promptly notify the University of the existence and outcome of any complaint of harassment by, against, or involving any Student Intern. The Internship Site shall be fully liable for any unlawful discrimination or harassment that is found to have occurred by its employees or agents. In accordance with the Family Educational Rights and Privacy Act (FERPA), the Internship Site understands that the information submitted by the University is confidential and shall be used only for the purposes necessary for this internship. The Internship Site agrees to permit site visits by the Career and Professional Development staff within 14 days of Chapman University's request for such site visit. The Internship Site understands that the information shall only be made available to individuals having a need to know in order to fulfill the purposes of the internship, and the Internship Site will not discuss or disclose this data with any third party outside of the purposes stated in this agreement, unless required to do so by law. The Internship Site understands that failure to comply with the requirement not to release information, except for the sole purpose stated above, will constitute harm to the University and the Student Intern and will result in cancellation of this agreement. In accordance with the Family Educational Rights and Privacy Act (FERPA), the Internship Site understands that the information submitted by the University is confidential, shall be used only for the purposes necessary for this internship, and shall not be re-disclosed to any third party without the consent of the Student Intern.

Site Supervisor Signature [Signature] Date 2/26/2019  
*Handwritten and electronic signatures accepted. Typed names will not be accepted as signatures.*

*Once this form has been completed and signed by the Site Supervisor, the Student Intern must upload a scanned copy of the completed form to the Chapman University Internship Portal.*

Chapman University Career and Professional Development  
 chapman.edu/internships | (714) 997-6942 | internships@chapman.edu



## The SPI Internship Program





# "Quarterly Professional Strategic Development" **Kaizen**

Name: \_\_\_\_\_ Team-Mate: \_\_\_\_\_ Date: \_\_\_\_\_

Position: \_\_\_\_\_ Career Goal: \_\_\_\_\_

STEP #1: Identify the Top 10 Most Critical Skills Needed to Achieve Your Career Goal. Circle Number.

STEP #2: Rate Your Current Performance on Only These Top 10 (10 Highest - 1 Lowest) in "Rating A".

STEP #3: Total Your Score at Bottom (Grand Total). Only on These 10 Items You've Selected.

STEP #4: Your "Team-Mate" Identifies The Top 10 and Ratings Based Upon Their Perspective of You.

STEP #5: You and Team-Mate Identify the Top 3 by Strategic Priority for Measurable Improvement.

STEP #6: You and Team-Mate List Immediate Follow-Up Actions for Strategic Improvement.

<b>Rating</b>			<b>Rating</b>		
<b>Skill</b>	<b>A</b>	<b>B</b>	<b>Skill</b>	<b>A</b>	<b>B</b>
1. Clarity of Goals and Objectives			17. Professional "Can Do" Attitude		
2. Technical Knowledge, Capability			18. Conspicuous Engagement		
3. Innovation Thinking			19. Coach-ability		
4. Decisiveness			20. Articulate Oral Communications		
5. Strategy and Planning			21. Art of Questioning / Understanding		
6. Defining Problems and Issues			22. Team Motivational Skills		
7. Analytical Ability			23. Conflict and Negotiation Skills		
8. Evaluating and Following Priorities			24. Persuasive Presentation Skills		
9. Highly Organized Mindset			25. Patience and Tolerance		
10. Ability to Concentrate			26. Empathy and Understanding		
11. Rapid Execution and Follow-Through			27. Ability to Accept Criticism		
12. Self-Motivated			28. Handling Stress and Pressure		
13. Conspicuous Attention of Detail			29. Effective Professional Networking		
14. Gets Things Done Ahead of Schedule			30. Balance of Life		
15. Time Management			31. Continuous Personal Development		
16. Professional Image and Appearance			32. Other: _____		

**Kaizen**

Grand Total: **0** **0**

<b>C. Top-3 Priorities</b>	<b>D. Key Strategic Improvements</b>
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____



## The SPI Internship Program







# Strategic Branding - "Touch-Point" Check-List (SBTA)

Kaizen

Date: \_\_\_\_\_

"Conspicuous Competitive Advantage"



No:	Touch-Point	Rating	Role-Model	Kaizen for Ongoing Improvements
1	The Ideal Prospective Customer "Succinct Statement"			
2	Brand Specialty Determination "I Know a Guy", "The Specialist"			
3	Tagline - Unique Competitive Advantage, "Meeting Specific"			
4	PR Photo - "You Are The Brand" Office, Team, Projects			
5	Email - Address, Signature, Photo, Tagline, Links, Etc.			
6	Linkedin Profile - Initial Contact Branding Promo., "Meeting Specific"			
7	Business Card - "Meeting Specific", Back Side, Exchange Process			
8	1st Impression - Dress, Appearance			
9	Personal Introduction - "Meeting Specific", No Elevator Pitch			
10	Rapid Email Follow-Up - Wording, CC			
11	Website - URL, Home Page, About Us, Printable, PDF			
12	Raving Fan Referral Email Template - Wording, LI Profiles (2), JPEG			
13	1-Sheet - Flyer, Product Description, JPEG			
14	Brochure (8-Pages), PDF			
15	Company Background Profile, PDF			
16	SME Guidebook as Brand Credibility, PDF			
17	Social Media Posts Template - LI, FB, Instagram, Twitter			
18	Relevant Client Project Samples, PDF			
19	Showcase Demonstration, Take-Aways, Pass Along			
20	Proposal, Contract Samples			
21	Definitive Book as Your Business Card			

## The SPI Internship Program



# Internship - Functional Org. Chart



**Kaizen**

**CEO**  
**Dr. Pete Johnson**

**Date:** \_\_\_\_\_

**Coordinator**  
**Rene**

**Real-Time  
Data Coordination**

**Logistics / OPS  
Support Details**

**Real-Time  
Web Research,  
PDR Reports**

**Photography  
Meeting Photos,  
PR Photos**

**Technical Support**

- \* SEP Update
- \* SAP Development
- \* SEP/SAP Printing
- \* Email Send Out
- \* Oversee Group

- \* Table Set Up
- \* Taping
- \* Coffee Brew, White Board, Meeting Clean Up, Curtains
- \* Business Cards, Tent Cards
- \* Page Number, Covers Printing
- \* Binding
- \* Food Replacement
- \* Photo - Photography, Memory Stick

- \* Website R & A
- \* Chrome Cast Set Up
- \* LinkedIn R & A
- \* PDR Set Up
- \* Email Signature
- \* PR Photoshop

- \* Website R & A
- \* Chrome Cast Set Up
- \* LinkedIn R & A
- \* PDR Set Up
- \* Email Signature
- \* PR Photoshop

- \* Cloud Folder Updates
- \* Website PR Updates



## The SPI Internship Program





# "California Internship Guidelines"

**Kaizen**

## Legal Requirements for Unpaid Internships

*According to the U.S. Department of Labor and the California Department of Labor Standards Enforcement, there are certain standards that employers must follow when taking on unpaid interns. These requirements are intended to ensure that the intern is really receiving a valuable learning experience in exchange for free labor. Unless ALL of the the following criteria are met, the intern is legally an employee, who must be paid the minimum wage, overtime, and receive all of the other protections guaranteed by state and federal employment laws:*

-----

1. The extent to which the intern and the employer clearly understand that there is no expectation of compensation. Any promise of compensation, express or implied, suggests that the intern is an employee-and vice versa.
2. The extent to which the internship provides training that would be similar to that which would be given in an educational environment, including the clinical and other hands-on training provided by educational institutions.
3. The extent to which the internship is tied to the intern's formal education program by integrated coursework or the receipt of academic credit.
4. The extent to which the internship accommodates the intern's academic commitments by corresponding to the academic calendar.
5. The extent to which the internship duration is limited to the period in which the internship provides the intern with beneficial learning.
6. The extent to which the intern's work complements, rather than displaces, the work of paid employees while providing significant educational benefits to the intern.
7. The extent to which the intern and the employer understand that the internship is conducted without entitlement to a paid job at the conclusion of the internship.

***Our Mission:*** *To help design, develop and orchestrate a Disruptive Innovation Program and Execution Planning System for growing your future.*

**KAIZEN - The Relentless Pursuit of Continuous Innovation and Improvement.**

Strategic Performance Institute

[www.PeerAdvisoryForum.com](http://www.PeerAdvisoryForum.com)



## The SPI Internship Program







# OPS Team - Onboarding Check-List

Kaizen

Intern

Mentor

Date: \_\_\_\_\_

No:	FOLLOW-UP ACTION ITEMS	Mentor	Critical Date	Status %	Date Verified
01	PAF Website - Walk-Through, Cloud Files				_____
02	PAF Website Set-Up - PR Photo, LinkedIn Link, Bio (Updates)				_____
03	PAF Cloud Base - Bookmark, Pin Tab				_____
04	Cloud Folder Set-Up - SCP, Zoom 1:1 Meeting Out-Brief Report Set-Up				_____
05	PAF Master Schedule - Weekly, CTFS, ETD				_____
06	ETD Page - Location, Major, Graduation (M/Y), Cell, Email (Gmail)				_____
07	CTFS Page - Days Available (11:00 - 3:00)				_____
08	SCP Report - Walk-Through				_____
09	Strategic Ground Rules - Key Elements				_____
10	Rapid Reply All Key Emails / Text / GroupMe (Set-Up) - Received				_____
11	Your Meeting Introduction - Wording				_____
12	OPS Team - 5 Functions				_____
13	Email Signature Set-Up - PR Photo, Contact Details				_____
14	LinkedIn Profile Updates - PR Photo, Background, Summary, etc.				_____
15	Non-Disclosure Agreement (NDA)				_____
16	Dress Code - PAF, 1:1, OPS Team Meetings				_____
17	Always Bring - Laptop (Full Charge), SCP Report, Journal, Pen, Power Cord				_____
18	Business Cards, How to Present				_____
19	PR Photo - Update				_____
20	PAF SEP Reports - Access Set-Up				_____
21	Your OPS Meetings Schedule - Next 2 Weeks				_____
22	Assigned Intern Wingman / Mentor				_____
23	PAF Member Assignments				_____
24					
25					
26					
27					
28					
29					

## The SPI Internship Program







**Dr. Pete Johnson**  
Specializing in a Unique Military Approach to the Rapid Strategic Execution of Business & Marketing Plans since 1979 ★ "When You Just Can't Afford to Fail... Sun Tzu. So, Where's Your PLAN?"  
Orange County, California, United States · [Contact info](#)

[www.linkedin.com/in/drpetejohnson/](https://www.linkedin.com/in/drpetejohnson/)

The Peer Advisory Forum  
North Adams State College

### About:

For Your Convenience Contact Me At: (949) 233-5566 - [Pete@StrategicPlanning.com](mailto:Pete@StrategicPlanning.com) - [www.PeerAdvisoryForum.com](http://www.PeerAdvisoryForum.com) - [www.StrategicPlanning.com](http://www.StrategicPlanning.com)... The 5 Major Reasons Why 99% of All Strategic Business & Marketing Plans Fail and How to Fix Them... FAST.

It's been said that... "The Most Organized, Most Focused, Most Prepared... will consistently prevail." – Sun Tzu (The Art of War). Having worked in a long-term strategic role with some of the top organizations over the past 40+ years, I've experienced this first-hand.

### The 5 Most Common Problems:

- #1. Lack of "A Succinct Written Business Plan" - The so called "1-Page" Strategic / Business Plans outlining very optimistic 10X-type goals may look like an interesting concept, BUT, in reality WITHOUT a fluid 'Working' Strategic Execution System it seems more like written DREAMING!
- #2. Lack of a Highly Operational "CORE-TEAM" – Your team of 4-5 highly organized, motivated and engaged individuals that should be chosen for their 100% reliable at rapid follow-through.
- #3. Inadequate Preliminary "DUE DILIGENCE" System – This enables you to very quickly become very organized and prepared for every meeting, discussion or opportunity.
- #4. Ineffective "ACCOUNTABILITY" and Follow-Through Systems - Weekly meetings should focus on the Top Priorities that can move you rapidly forward rather than the typical rehash.
- #5. Inadequate Monthly Performance-On-Goal "RE-CALIBRATION" – Because no pre-designed Plan ever survives long in today's ever changing business arena. The critical key is a fluid Plan INFRASTRUCTURE.

"A Verified Proven Track-Record" (The Top 25 Strategic Clauses Since 1979)

Rank	Clause	Success Rate	Year	Source
1	1. A Succinct Written Business Plan	99%	1979	Strategic Planning
2	2. A Highly Operational CORE-TEAM	99%	1979	Strategic Planning
3	3. A Preliminary DUE DILIGENCE System	99%	1979	Strategic Planning
4	4. An Effective ACCOUNTABILITY and Follow-Through System	99%	1979	Strategic Planning
5	5. A Monthly Performance-On-Goal RE-CALIBRATION System	99%	1979	Strategic Planning
6	6. A Fluid Plan INFRASTRUCTURE	99%	1979	Strategic Planning
7	7. A Rapid Strategic Execution System	99%	1979	Strategic Planning
8	8. A Unique Military Approach to Business	99%	1979	Strategic Planning
9	9. A Proven Track-Record of Success	99%	1979	Strategic Planning
10	10. A Verified Proven Track-Record	99%	1979	Strategic Planning
11	11. A Succinct Written Business Plan	99%	1979	Strategic Planning
12	12. A Highly Operational CORE-TEAM	99%	1979	Strategic Planning
13	13. A Preliminary DUE DILIGENCE System	99%	1979	Strategic Planning
14	14. An Effective ACCOUNTABILITY and Follow-Through System	99%	1979	Strategic Planning
15	15. A Monthly Performance-On-Goal RE-CALIBRATION System	99%	1979	Strategic Planning
16	16. A Fluid Plan INFRASTRUCTURE	99%	1979	Strategic Planning
17	17. A Rapid Strategic Execution System	99%	1979	Strategic Planning
18	18. A Unique Military Approach to Business	99%	1979	Strategic Planning
19	19. A Proven Track-Record of Success	99%	1979	Strategic Planning
20	20. A Verified Proven Track-Record	99%	1979	Strategic Planning
21	21. A Succinct Written Business Plan	99%	1979	Strategic Planning
22	22. A Highly Operational CORE-TEAM	99%	1979	Strategic Planning
23	23. A Preliminary DUE DILIGENCE System	99%	1979	Strategic Planning
24	24. An Effective ACCOUNTABILITY and Follow-Through System	99%	1979	Strategic Planning
25	25. A Monthly Performance-On-Goal RE-CALIBRATION System	99%	1979	Strategic Planning





## Experience:

### **The Peer Advisory Forum**

**Dates Employed: Jan 2015 – Present**

**Location: Laguna Hills, California**

The concept of Peer Advisory Forums, CEO Round Tables, Executive Mastermind Groups, etc. has been around for decades and has proven to be an invaluable support function for many of their members. Having worked as both a speaker as well as strategic consultant for Vistage, TEC, The Young Presidents Organization and numerous other very similarly group-membership organizations going back as far as 1986, I'd noticed several very common issues.

The 5 Most Common Problems of Peer Group Formats and How to Address Them:

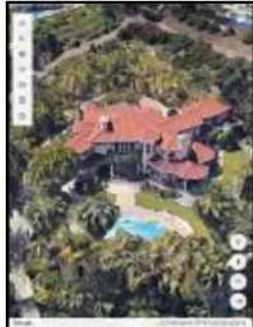
#1. The typical use of an open-forum "HOT-SEAT / SPIT-BALL" FORMAT for discussing a member's very critical issue – Consider selecting sub-teams of 4-5 members based upon the issues or topics. Each discussion group then briefs their Proposed Plan in an open forum for a second round of input.

#2. Inadequate Follow-Up "ACCOUNTABILITY" on critical issue Chair assistance and support.

#3. TIME LIMITATIONS for member's 1 on 1 Monthly (1.7 – 2 hour) Coaching Sessions.

#4. Choosing not to incorporate some type of Operational Support Teams (either Group Chair or member's staff) to capture meeting discussion input and ideas for follow-up accountability.

#5. Some type of MEMBER ISSUE EXECUTION PLAN for coordinating the groups input and support for member's progress and growth.



"Having utilized Dr. Johnson's strategic consulting services extensively on almost a monthly basis from 1994 through 2005, I can personally attest to his unparalleled attention to detail and consistent execution performance on mission-critical objectives." - David Manning, Former Director - Field OPS, STRICOM (US Army)

Pete - "Just finished up with the bank lunch. He was really impressed with our Strategic Plan to say the least. His quote was "in my 25 years in banking, I've never seen anything like this". Later in the conversation we asked him what it was going to take to increase our line of credit. His response, "well you've already got it right here in this strategic plan, all I need to do is send me your financials when the year is completed and show all this to my underwriter." ..... "Thought you'd like to hear that bit of news!!! Thanks." - Mike Cachat - President, C.E.O. - Jenson USA (10 Days following their 2-Day Retreat)

"Just wanted to add to our conversation earlier and the "improvements" we have made... This evening we received official word that we secured MBDO No. 01. To say the very least, we are excited and once again have your methodology to thank as it is just one of many major contracts to come through your guidance." - Robert Davis, COO - Aspetto, Inc. (Ballistic Clothing / Tactical Gear)

"We've been excited to work with you as you have transformed us from Average to WOW in just 10 weeks of work. Your guidance has been the answer to Prayer, thanks." - Frank Garcia, President - InsuranceKO





**Caleb Sachs** · 1st

Marketing Focus Group Coordinator & Co-Facilitator - The Strategic Performance Institute

Costa Mesa, California, United States · [Contact info](#)

## LinkedIn Profile

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The Strategic Performance Institute

California State University, Fullerton

## About:

For Your Convenience Contact Me At: (714) 697-6940 - [CalebSachs1@gmail.com](mailto:CalebSachs1@gmail.com) - [www.PeerAdvisoryForum.com](http://www.PeerAdvisoryForum.com) - The Top 5 Digital Marketing Mistakes Most Businesses Make and How to Fix Them... FAST.

"The Most Organized, Most Focused, Most Prepared...will consistently prevail." -Sun Tzu - (The Art of War - 500 BC)

**#1. No True Succinct Clarity on Your Target Audience or Digital Target Market** - The first step to establishing a digital marketing plan is having a clear understanding of your prospective client and the specific results you want to achieve. Investing the time to develop buyer personas will provide amazing value to your content creation team.

**#2. Failing to Create a Documented Strategy** - Failing to do your detailed due diligence in digital marketing planning is one of the biggest marketing mistakes. It's important to not only establish your goals but to clearly map out the activities your business will do in order to make them happen.

**#3. Not Paying Attention to Your Analytics** - In digital marketing, there's no such thing as "set it and forget it." Campaigns require maintenance and oversight. This continual ongoing recalibration means checking in regularly to measure performance.

**#4. Forgetting to Promote Content** - One surefire way to lose money in marketing is poor content promotion. 50 percent of content gets eight shares or less and for three clear reasons:

- Ineffective research and understanding
- Ineffective amplification and promotion
- Ineffective trend awareness

**#5. Ignoring the Sales Funnel** - No matter what type of marketing you choose, your customers are going to go through some type of sales funnel and your job is to guide them through the funnel from first hearing about your company to becoming loyal repeat customers by putting measures in place at every touch point to encourage them to move further toward conversion.

So... if you are completely satisfied with the level of results and success your current strategies and plans are presently producing, then obviously stick with them. But, if not... seriously consider rethinking and re-engineering them immediately!






## Experience:

**The Strategic Performance Institute**  
**Dates Employed: Jul 2020 – Present**  
**Location: Laguna Hills, California**

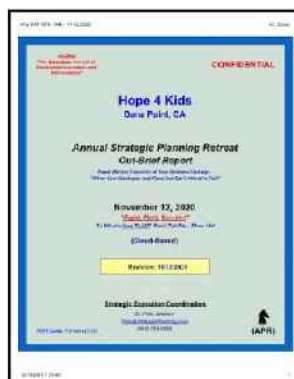
- Interfaced with corporate / business clients to custom design target market and strategic customer focus groups
- Developed highly tailored focus group questions specific to product and service improvements
- Co-facilitated focus group discussions through both face-to-face as well as remote access (Zoom) environments
- Compiled and synthesized focus group input data into concise relevant project out-brief reports
- Developed and coordinated OPS Team "After Action Review" Reports to further Kaizen the focus group's infrastructure



"Caleb, I want to personally thank you for the truly outstanding job you've done overseeing and coordinating our digital marketing programs over this past year with our highly diverse client base. Your attention to detail and rapid follow-through has become a vital asset to our organization. Several of our clients have singled you out as the cornerstone of our digital marketing team. For all you've contributed it's truly been a job well done." - Dr. Pete Johnson – CEO, Strategic Performance Institute

"It has been an absolute pleasure having you on my team during our management meetings. You have consistently shown your organizational skills leading our strategic operations and business planning to our clients and myself. Without your tenacious support, I would not be able to move my business during this pandemic off the ground and so quickly. Thank you!" - Adam Coughran - President of Safe Kids Inc.

"Thank you for your critical involvement leading and organizing the strategic operations team for the business forum. Your facilitation skills during our think tank planning discussions have been a true game changer for myself and many other CEO's. Seeing your work ethic and how prepared you were to adapt to new challenges has been refreshing!" - Lee Greytak - CEO of First Dynamics








## "A Verifiable Proven Track-Record" The Top-25 Strategic Clients since 1979

**Kaizen**  
Pete@StrategicPlanning.com

No:	Client	Key Contact	Location	Start	Duration	Type Project	Comments	Origin
01	STRICOM (US Army)	<a href="#">Available Upon Request</a>	Orlando, FL	1994	11 Years	Rapid Strategic Execution	3 Weeks per Month	Evans
02	Wise Manufacturing	<a href="#">Available Upon Request</a>	Atlanta, GA	1986	14 Years	Rapid Strategic Execution	1 Week per Month	SpinOff
03	Duke Energy	<a href="#">Available Upon Request</a>	Charlotte, NC	1994	1 Year	Competitive Strategic Selling	2 Weeks per Month	Evans
04	US Airways	<a href="#">Available Upon Request</a>	Pittsburgh, PA	1980	2.5 Years	Competitive Customer Service	4 Weeks per Month	Lizardi
05	TD Financial Services	<a href="#">Available Upon Request</a>	Anaheim, CA	1991	3.5 Years	Strategic Planning	2 Days per Month	SpinOff
06	DAHC (US Army)	<a href="#">Available Upon Request</a>	Arlington, VA	2007	1.5 Years	Strategic Planning	1 Week per Month	Manning
07	ETOLA Industrial	<a href="#">Available Upon Request</a>	Tianjin, China	2011	5 Years	Rapid Strategic Execution	3 Weeks per Year	Vistage
08	AESIP (US Army)	<a href="#">Available Upon Request</a>	Alexandria, VA	2012	1 Year	Rapid Strategic Execution	1 Week per Month	LinkedIn
09	Cayman National Bank	<a href="#">Available Upon Request</a>	Grand Cayman	1998	2 Years	Strategic Planning	1 Week per Quarter	Agent
10	US Army Staff College (US Army)	<a href="#">Available Upon Request</a>	Ft. Belvoir, VA	2007	2 Years	Strategic Thinking	2 Days per Quarter	Agent
11	York Graphics	<a href="#">Available Upon Request</a>	York, PA	1985	5 Years	Strategic Execution	1 Week per Month	SpinOff
12	Georgia Power Group	<a href="#">Available Upon Request</a>	Atlanta, GA	1995	1 Year	Competitive Strategic Selling	1 Week per Month	NSA
13	American Management Association	<a href="#">Available Upon Request</a>	New York, NY	1981	4 Years	Leadership	2 Weeks per Month	Lizardi
14	Boelter Supply Company	<a href="#">Available Upon Request</a>	Milwaukee, WI	1991	7.5 Years	Strategic Planning	1 Week per Year	YPO
15	Australia Sales Congress	<a href="#">Available Upon Request</a>	Brisbane, Australia	1987	5 Years	Competitive Strategic Selling	2 Weeks per Quarter	NSA
16	Advanced Management Institute	<a href="#">Available Upon Request</a>	San Francisco, CA	1984	2 Years	Strategic Marketing	2 Weeks per Month	NSA
17	National Association for Healthcare	<a href="#">Available Upon Request</a>	Washington, DC	1992	4 Years	Strategic Planning	1 Week per Year	SpinOff
18	Young Presidents Organization	<a href="#">Available Upon Request</a>	New York, NY	1986	6 Years	Rapid Strategic Execution	1 Day per Month	SpinOff
19	Vistage / TEC	<a href="#">Available Upon Request</a>	San Diego, CA	1996	20 Years	Rapid Strategic Execution	3 Days per Month	SpinOff
20	Al-Waseel	<a href="#">Available Upon Request</a>	Jeddah, Saudi Arabia	1996	2 Years	Strategic Planning	2 Weeks per Quarter	SpinOff
21	American Society of Association Executives	<a href="#">Available Upon Request</a>	Washington, DC	1984	9 Years	Strategic Planning	3 Days per Year	SpinOff
22	American Society for Quality Control	<a href="#">Available Upon Request</a>	Milwaukee, WI	1989	3 Years	Strategic Planning	1 Week per Year	SpinOff
23	Consumer Bankers Association	<a href="#">Available Upon Request</a>	Washington, DC	1986	4 Years	Strategic Planning	3 Days per Year	SpinOff
24	Training & Simulation Technology Consortium	<a href="#">Available Upon Request</a>	Orlando, FL	1995	1 Year	Rapid Strategic Execution	1 Week per Month	Manning
25	Defense Logistics Agency (US Army)	<a href="#">Available Upon Request</a>	Arlington, VA	1994	2 Years	Strategic Planning	3 Annual Retreats	Evans



**Strategic  
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*“When Your Strategies and Plans Just Can’t Afford to Fail!”*

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