

Membership Information Packet

The Peer Advisory Forum

“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



The Peer Advisory Forum

25502 Saddle Rock Place

Laguna Hills, CA 92653

(949) 233-5566

Pete@StrategicPlanning.com

www.PeerAdvisoryForum.com

Prospective Peer Advisory Forum Member:

Thank you for your interest in The Peer Advisory Forum's Monthly Membership Program. With the ever increasing issues and challenges facing business owners and executive leaders today, having an experienced sound strategic sounding-board can be valuable business asset. It not only helps minimize micro-analysis but can also help provide critical additional, value-added resources and guidance with critical projects. This is far more than just a business coach but rather a hands-on strategic analyst providing insights on not just the What, but Why Now.

With all of the highly organized CEO Groups in our area such as the Young Presidents Organization, Vistage International, EOS, Action Coaching etc, etc, etc... there is certainly no shortage of highly certified CEO coaches. Regardless of a 20 - 30 year "Verifiable Proven Track Record".,, it all comes down to your visibly measurable forward progress on Plan.

Our Mission: To provide a highly-organized think-tank environment to discuss directly relevant strategies, ideas and suggestions to further KAIZEN and Grow Your Business. But what keeps our members pro-actively involved are the monthly 1:1 Strategy Sessions that can also include their Team when critically appropriate.

In the Spirit of Continuous Growth and Evolution.

Dr. Pete Johnson

Dr. Pete Johnson

The Peer Advisory Forum



“THE PEER ADVISORY FORUM”

An opportunity to work ON your business rather than just IN your business.

Our Mission: To provide a highly-organized think-tank environment to discuss directly relevant strategies, ideas and suggestions to further KAIZEN and Grow Your Business.

“Growing Your Business... What’s Your Plan?”

- ♦ A “Real-World” Working Business Plan Focused on Growing Your Business 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 Your Industry and Marketplace.
- ♦ 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.
- ♦ Continuous Strategic Review and Analysis of Your Business and Marketing Strategies, Plans and Resources.
- ♦ Your Team’s Annual 2-Day Strategic Planning Retreat.

KAIZEN - The Relentless Pursuit of Continuous Innovation and Improvement.

Special Invitation

“The 3rd Friday”

10:00 a.m. - 2:00 p.m.

Networking: 9:30 a.m. - 10:00 a.m.

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

**Regular Monthly Meetings
3rd Friday of the Month**

**RSVP: By Email Today
Pete@StrategicPlanning.com**



**Dr. Pete Johnson
Strategic Analyst
Peer Advisory Forum**

A Unique Concept...

- ♦ So Much More Than Just Another CEO Roundtable Focused on Discussing Critical Issues.
- ♦ Hard-Copy of Your Updated “Working” Strategic Business Plan provided to all Peer Advisory Forum members at the start of each monthly meeting.
- ♦ Because Measurable RESULTS are the Name of the Game.

Don’t Tell Me, Show Me!



PAF - ABOUT US

The Peer Advisory Forum

Program Overview

Our Mission: To provide a highly-organized think-tank environment to discuss directly relevant strategies, ideas and suggestions to further KAIZEN and Grow Your Business.

The Program: A very unique, highly organized monthly membership meeting (third Friday, 10:00 - 2:00) focused on the Top-3 Strategic Priorities of each member incorporating a deep-dive team discussion on critical issues.

****** Provide each member with a "Working" Strategic Business Execution Plan that gets reviewed and updated every month and is provided at the start of each monthly meeting.

***** Individual 1:1 Monthly Strategy Sessions (2 - 3 hours) that will also allow PAF members to invite additional members of their team to participate in detailed discussions on specific issues and opportunities incorporated in the member's Strategic Execution Plan.

***** Extensive Strategic Analysis of critical issues and initiatives throughout the month regardless of the time and support resources involved as a critical component of membership.

***** Strategic Branding, Business Development Strategy and Target Market Research and Analysis reviewed and KAIZENED as an ongoing process.

***** Extensive Internship Support Team to assist during membership meetings and monthly 1:1 Strategy Sessions. Interns are frequently assigned to also support member projects and meetings as an added value to the PAF Program.

****** Annual 2-Day Strategic Planning Retreat scheduled in November every year for the members and their company teams as an integral part of their membership. Interns are assigned to work with each member / company providing real-time data capture and Plan development / editing.

***** 24/7 Telephone Support on critical issues as needed.

The Key Elements of The Program:

***** A Real-World, "Working" Strategic Business Execution Plan - Updated Monthly

***** 1-Page Strategic Goals, Objectives & Priorities - Evaluated, Updated Quarterly

***** Current Critical Issues Analysis - Evaluated, Updated Quarterly

***** Target Market Research & Analysis, ***** Strategic Branding and Touch-Point Analysis

***** Rapid Strategic Execution as Your Competitive Advantage

And Much, Much More...

A Verifiable Proven Track Record of Success:

Current Member Contact Information Available Upon Request.



Strategic Priorities

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

A. Top-4 Metric Goals for This Year:

Metrics	2021	2022	2020	2019
1.				
2.				
3.				
4.				

B. CEO's - Direct Reports / Position:

1.		3.	
2.		4.	

C. Top-3 Past Major Strategic Accomplishments:

1.
2.
3.

D. Top-3 Critical Critical Issues:

1.
2.
3.

E. Top-3 Upcoming Key Events:

Event	Date	Total Days	Location	Team
1.				
2.				
3.				

F. Top-3 90-Day Major Strategic Priorities:

Strategic Priority	Lead	Wingman	Target Date	Progress
1.				
2.				
3.				

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Master Schedule - OPS / PAF

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[Zoom - Launch](#)

[PAF Agenda](#)

[BF Agenda](#)

[BF Attend](#)

Date: _____

[Dr. Pete](#)

A. Peer Advisory Forum (PAF):

1. Lee Greytak	4th,M
2. Adam Coughran	1st,Th
3. Tom Sheltraw	4th,Th
4. Steve Jadcak	1st,T
5. Peggy Roger	1st,W
6. Doug Clark	4th,T
7. Shaul Yehezkel	1st,F
8. Daniel Cazares	2nd,W
9. Brian Connors	3rd,T

B. Forums Meetings:

1. Focus Group
2. PAF
3. OPS Team
4. Bus. Forum
5. AMA - Forum
6. Lee - Forum
7. Tom - Forum
8. Guest - Agendas
9. Aspetto

Guest-Agenda

Friday
3rd.F
Fridays
2nd/4th.T
2nd/4th.W
3rd.W
2nd.W

4/9/2021

C. OPS-Team (OPS):

1. Rene Rojano
2. Angel Mendoza
3. Maria Pareja
4. Huong Hoang
5. Freddy Solis
6. Josh Low
7. Maxwell Boscardin
8. Leon Phung
9. Thomas Park
10. Caleb Sachs

BF RSVP

T,W,F
M-F
T-F
T,Th,F
M-F
M-F
M,T,W,F
M,Th,F
M-F

[SAP Master](#)

[PDA Master](#)

[AAR Master](#)

[SEP Mstr.](#)

[SCP Mstr.](#)

"OPS Team - 30 Min. Prior"

D. 2021 Meeting Schedule:

All Dates Subject to Change

Event Attend - OBR

Details

#	Date	Day	Meeting	RTDC	Logistics	OPS Team	Time
721	June 07, 2021						11:00 AM
#	1:00 PM		-Steve	-Angel	-Freddy		1:00 PM
722	June 08, 2021	Tuesday	OC-BF	Angel	Huong	Freddy,Caleb,Josh,Maria	8:00 AM
#	1:00 PM						1:00 PM
722	June 09, 2021	Wednesday					11:00 AM
#	1:00 PM		Daniel			Huong, Maria	1:00 PM
722	June 10, 2021	Thursday					11:00 AM
#	1:00 PM		Nelly-PJ	Caleb			1:00 PM
722	June 11, 2021	Friday	Shaul	Maria	Huong	Freddy, Caleb	1:00 PM
721	June 14, 2021	Monday					11:00 AM
#	1:00 PM						1:00 PM
722	June 15, 2021	Tuesday	Brian				11:00 AM
#	1:00 PM						1:00 PM
722	June 16, 2021	Wednesday					11:00 AM
#	1:00 PM		Eric			Huong	1:00 PM
722	June 17, 2021	Thursday					11:00 AM
#	2:00 PM		CSUF-Zoom				2:00 PM
722	June 18, 2021	Friday					11:00 AM
	1:00 PM						1:00 PM
	1:00 PM	Saturday	H4K-Board	Rene	Maria P	Huong	1:00 PM
721	June 21, 2021	Monday					11:00 AM
#	1:00 PM						1:00 PM
722	June 22, 2021	Tuesday	OC-BF	MariaP.	Huong	Freddy, Caleb	8:00 AM
#	1:00 PM						1:00 PM
722	June 23, 2021	Wednesday					11:00 AM
#	1:00 PM						1:00 PM
722	June 24, 2021	Thursday					11:00 AM
#	1:00 PM						1:00 PM
722	June 25, 2021	Friday					1:00 PM

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The Peer Advisory Forum - Agenda



3rd Friday of the Month

25502 Saddle Rock Place, Laguna Hills, CA 92653

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A day of working "On" your business rather than just "In" your business.

Our Meeting Objectives:

1. What relevant ideas can I personally glean from today's meeting and discussions that I can rapidly implement in the next 48 hours that will improve my effectiveness and results? (**KAIZEN**)
2. What can I personally gain from today's meeting and discussions that will help me continue to fine tune and improve my execution plan as I move forward? (**KAIZEN**)
3. What input and feedback can I gain from my colleagues that will help me continue to improve my on-going success? (**KAIZEN**)

Agenda

Sample

9:30 Coffee, Tea, Etc.

10:00 Call-To-Order, Agenda, Opening Comments

Dr. Pete

- Introductions, Guests - **Name, Company, City, Bus. Tenure, PAF Tenure**

All

- Distribute Updated SEP Reports

Dr. Pete, Members

- Special Updates / Announcements

Dr. Pete, Members

- **Member - Pressing Issue / Crisis Needing Immediate Attention**

Dr. Pete, Members

- Member Top 3 Strategic Priorities, List

Dr. Pete, Members

- Your #1 Discussion Priority (For Today)

Dr. Pete, Teams

- Member 1:1 Meetings Scheduling (By Seniority)

Dr. Pete, Members

- Sub-Team Discussion Assignments (Top 2 Topics)

Dr. Pete, Teams

- Team Discussion Brief-Outs, Open Forum Discussions

Dr. Pete, Teams

- **Focus Group Discussion - Member Projects**

Dr. Pete, Members

- Rapid Execution Follow-Up List Assignments

Dr. Pete, Members

- Next Month's Meeting Agenda - Topics Suggestions

Dr. Pete, Members

- Distribute Team Discussion Reports, PAF Schedule, Next Agenda

Dr. Pete, Members

2:00 Closing Comments, Adjourn

Dr. Pete, Members

- Optional Sidebar Discussions / Meetings

Dr. Pete, Members

Our Mission: "To set-up and help coordinate an exceptionally well organized, effective and efficient goal Strategy, Planning and Rapid Execution Accountability System."

KAIZEN - The Relentless Pursuit of Continuous Innovation and Improvement.

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Zoom - Monthly SEP Meeting Agenda



Meeting Date

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Name (1st.Th)

Our Mission: To provide a highly-organized, think-tank environment to discuss directly relevant strategies, ideas and suggestions to further KAIZEN and Grow Your Business.

Purpose of Today's Meeting:

"What Can We Be Doing Differently Today That Will Significantly Improve the Visible Forward Progress We Will Get Tomorrow?"

The Agenda

Launch Zoom

Dr. Pete

OPS Schedule

Dr. Pete

Name

Name

Name

REAS / SEP - Name

LinkedIn - Name

Website - Name

SAP File - Name

PDA File - Name

Past REAS - Name

Past Zoom - Name

Dr. Pete

- Opening Comments
- **Ask Questions at Any Time**
- OPS Team - Roles & Responsibilities
- Your Current Updates
- **Your Top-3 Recent Key Accomplishments**
- **Top-3 Strategic Priorities:**
 - A1
 - A2
 - A3
- Additional Discussion Issues:
 - >
 - >
 - >
- REAS - Updates

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

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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			

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Strategy Action Plan - Proposed

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Topic: LinkedIn IC Branding Strategy

Date: _____

Team: A Lead: Tevin Wingman: Sam Team-Mates: Adam, Tom, Eric, Pete

A. Strategic Objectives / Goals:		Initial Draft: 12/9/2016		
1.	Branding & Position - Direct Comparative Competencies - Target Market Relevance as <u>"The Specialist"</u> ,			
2.	Ideal Initial Contact Promotion - Verifiable Proven Track Record			
3.	Provide Valuable Relevant Value-Added Information & Material for Triggering Immediate Follow-Up Contact			
B. <u>Additional</u> Critical Issues / Challenges:		D. Key Elements: (Show Me)		
1.	OPS Team Trained on Process, Output Report	1.	PR Photo, Banner, Tagline, Company, 500+	
2.	Add Invites via iPhone, iPad	2.	Contact Me:, Top 5 List, Summary Media 4 Only	
3.	Preliminary Due Diligence Report - Analyze	3.	RFR Email Template, LI JPG Snapshot, Links	
C. The Ideal Game Plan:				
1.	Preliminary Due Diligence Analysis - Top 10	7.	Summary - Contact Me At: Phone, Email, Web	
2.	Vocation Brand - <u>"The Specialty"</u>	8.	Invite Process - 500+, 3,000+, 10,000+	
3.	PR Photo PDR - <u>"The Specialist"</u>	9.	Posts (3), Graphic , Title Specialist	
4.	Background Banner Composite Photos - <u>"The Specialist"</u>	10.	Summary - CV Bullet Points	
5.	Company Name, Position	11.	Companies - CV Bullet Points	
6.	Tagline - <u>"The Specialist"</u>	12.	Testimonials - As Experience (5), VPTR, Rec.Ltrs.	
D. Follow-Up Actions:		Lead	Wingman	Date
1.	LinkedIn Experts - PDR Research / Analysis	Pete	Rene	TBD
2.	Revamp Banner Graphic - <u>"The Specialist"</u>	Pete	Tevin	TBD
3.	Revamp Summary, Experience, Etc - Current Target Market Resonance	Pete	Fiona	TBD
4.	Postings - Strategic Branding Design (3)	Pete	Rene	TBD
5.	Experience - Target Market Resonance	Pete	Alex	TBD
6.	Expand Contacts - 10,000+	Pete	Tevin	TBD

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Rapid Execution Accountability System

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Member Name - Month Of: _____

Date: _____

A. Top-3 Strategic "A" Priorities

No.	Strategic Priority	Lead	Wingman	Tgt. Date	Progress
A1.					
A2.					
A3.					

B. Priority Follow-Up Actions

No.	Follow-Up Actions	Lead	Wingman	Tgt. Date	Progress
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					

C. Important Meetings, Calls, Appointments, Emails (See Calendar, Pre-Prep)

1	
---	--

D. Top-2 Most Significant Accomplishments Since Last Meeting

#1.		6.	
#2.		7.	
3.		8.	
4.		9.	
5.		10.	

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Strategic Performance Institute
Laguna Hills, CA 92653
www.PeerAdvisoryForum.com
Pete@StrategicPlanning.com

Membership Application

Revision: 06/01/2021

Name:	Title:
Company:	Year Founded:
Company Address	
City / State / Zip:	
Products / Services:	
Number of Employees:	Annual Revenue:
Cell Number:	Alternate Number:
Email:	Web Site:

THE PEER ADVISORY FORUM (PAF) FORMAT:

- **Our Mission: To set-up and help coordinate an exceptionally well organized, effective and efficient goal strategy, planning and rapid execution accountability system and provide detailed strategic advisory support.**
- The PAF Meeting - one day per month (10:00 am – 2:00 pm) located at the Strategic Performance Institute (SPI) Conference Room (25502 Saddle Rock Place, Laguna Hills, CA 92653 – Dr. Pete's Residence).
- Non-Disclosure (NDA) will be signed in Advance by all members as well as by any / all guests in attendance.
- Attire is business casual.
- Monthly One-to-One (1:1) Private Strategic Consulting Session (Not Coaching) - 2-3 Hours depending on member's needs and time availability, Location - the SPI Conference Room. To be scheduled at a mutually arranged day / time. Additional staff may attend 1:1 meetings.
- Additional One-to-One strategy support and assistance may be arranged on an as needed basis, based upon time availability.
- Member Quarterly Strategic Execution Progress Reviews will be held during each member's 1:1 meeting the first month of each quarter.
- Monthly Strategic Execution Plan development updates.



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- Two-Day Annual Membership and Staff Strategic Planning Retreat – November / December timeframe (Dates – TBD), Members may bring up to 4 of their additional staff.

INVESTMENT TERMS:

PAF terms are – based on one year (12 calendar months) annual membership.

- All fees will be paid as per agreement in order to participate in PAF.
- One-time registration fee of \$500 (US). To be paid with first month's fee.
- **PAF Membership Dues – paid at \$800 per month; due at the start of each month** and is non-refundable. Late fee of 10% may be imposed.
- The PAF Chair will give 1 months' notice to all members in the event of any schedule changes.
- In the event of any NDA non-compliance or unethical behavior by member – PAF can terminate and suspend a member's privileges even though payments are up to date.
- In the event a member's privileges are terminated, that month's dues will be refunded as well as any pre-paid dues.
- Any member may choose to terminate their membership at any time without cause or liable for any additional costs.

As a Peer Advisory Forum participant, I hereby acknowledge that I have read and understand the above and agree to each of these terms and conditions.

_____	_____	_____
Print Name	Signature	Date
 Dr. Pete Johnson		
_____	_____	_____
Print Name	Signature	Date

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



The Peer Advisory Forum

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Pete@StrategicPlanning.com

Acknowledgment of Risk and Confidentiality

The Strategic Performance Institute's (SPI) Peer Advisory Forum

As a participant in the Peer Advisory Forum Program sponsored by SPI, I agree that by participating in an Advisory Forum, a relationship of trust and confidence exists between myself and each person attending the Advisory Forum. While the free exchange of ideas is the purpose of the Advisory Forum Program, I agree that all ideas and communications disclosed during an Advisory Forum meeting that are of a confidential, novel, secret, and/or proprietary nature are to be held in confidence, and I further agree not to disclose such information nor permit its use.

I also acknowledge that any verbal or written disclosure of such information could be detrimental to the interests of all parties involved. SPI meetings are governed by mutual agreement of all members by a "Code of Silence".

I further agree that SPI is not responsible or liable for any claims or damages arising from any information disclosed or used by participants in their Peer Advisory Forum Program or beyond the limits of the Peer Advisory Forum setting, any raid or solicitation, and I agree to hold SPI harmless from all such claims.

As a Peer Advisory Forum participant, I hereby acknowledge that I have read and understand the above and agree to each of these terms and conditions.

Print Name

Signature

Date

The Peer Advisory Forum



Dear Dr. Pete,

We are days away from completing our second year of business.

In 2018, we finished the year just below one million dollars in sales.

In 2019, we reached 2 million in sales.

Looking forward into 2020, we are projected to make 6 million with 2.3 million already guaranteed in signed contracts.

I have expanded from solopreneur to a team of 12 employees and a host of sub contractors. We currently have 3 candidates in our pool of new-hires that will join our team within the next 60 days bringing our team to 15 employees. We currently have 8 company vehicles and are shopping for 3 additional trucks to add to our fleet.

Being a part of the Peer Advisory Forum and connecting with you for 1 to 1s has helped contribute to my company's success. I'm thankful for the opportunity to work with you, the interns, and PAF Members. I have learned a lot and have met many incredible people.

This has been a great journey.

I hope to join you for a cigar once in awhile or possibly an entire bag of chips. I owe you and many interns some shining recommendations on LinkedIn. I hope to share them with you sometime soon for your approval - before posting.

With much gratitude... I thank you for making me better.

Eric



Eric Olson

CEO & President, Olson Superior Plumbing

Office: [\(949\)328-6002](tel:9493286002) | Direct: [\(714\)717-5762](tel:7147175762)

Email: EricOlson42@gmail.com

Let's Connect on [LinkedIn](#)

www.OlsonSuperior.com

"Rapid 24/7 Service at Surprisingly Competitive Prices!"

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"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)	Available Upon Request	Orlando, FL	1994	11 Years	Rapid Strategic Execution	3 Weeks per Month	Evans
02	Wise Manufacturing	Available Upon Request	Atlanta, GA	1986	14 Years	Rapid Strategic Execution	1 Week per Month	SpinOff
03	Duke Energy	Available Upon Request	Charlotte, NC	1994	1 Year	Competitive Strategic Selling	2 Weeks per Month	Evans
04	US Airways	Available Upon Request	Pittsburgh, PA	1980	2.5 Years	Competitive Customer Service	4 Weeks per Month	Lizardi
05	TD Financial Services	Available Upon Request	Anaheim, CA	1991	3.5 Years	Strategic Planning	2 Days per Month	SpinOff
06	DAHC (US Army)	Available Upon Request	Arlington, VA	2007	1.5 Years	Strategic Planning	1 Week per Month	Manning
07	ETOLA Industrial	Available Upon Request	Tianjin, China	2011	5 Years	Rapid Strategic Execution	3 Weeks per Year	Vistage
08	AESIP (US Army)	Available Upon Request	Alexandria, VA	2012	1 Year	Rapid Strategic Execution	1 Week per Month	LinkedIn
09	Cayman National Bank	Available Upon Request	Grand Cayman	1998	2 Years	Strategic Planning	1 Week per Quarter	Agent
10	US Army Staff College (US Army)	Available Upon Request	Ft. Belvoir, VA	2007	2 Years	Strategic Thinking	2 Days per Quarter	Agent
11	York Graphics	Available Upon Request	York, PA	1985	5 Years	Strategic Execution	1 Week per Month	SpinOff
12	Georgia Power Group	Available Upon Request	Atlanta, GA	1995	1 Year	Competitive Strategic Selling	1 Week per Month	NSA
13	American Management Association	Available Upon Request	New York, NY	1981	4 Years	Leadership	2 Weeks per Month	Lizardi
14	Boelter Supply Company	Available Upon Request	Milwaukee, WI	1991	7.5 Years	Strategic Planning	1 Week per Year	YPO
15	Australia Sales Congress	Available Upon Request	Brisbane, Australia	1987	5 Years	Competitive Strategic Selling	2 Weeks per Quarter	NSA
16	Advanced Management Institute	Available Upon Request	San Francisco, CA	1984	2 Years	Strategic Marketing	2 Weeks per Month	NSA
17	National Association for Healthcare	Available Upon Request	Washington, DC	1992	4 Years	Strategic Planning	1 Week per Year	SpinOff
18	Young Presidents Organization	Available Upon Request	New York, NY	1986	6 Years	Rapid Strategic Execution	1 Day per Month	SpinOff
19	Vistage / TEC	Available Upon Request	San Diego, CA	1996	20 Years	Rapid Strategic Execution	3 Days per Month	SpinOff
20	Al-Waseel	Available Upon Request	Jeddah, Saudi Arabia	1996	2 Years	Strategic Planning	2 Weeks per Quarter	SpinOff
21	American Society of Association Executives	Available Upon Request	Washington, DC	1984	9 Years	Strategic Planning	3 Days per Year	SpinOff
22	American Society for Quality Control	Available Upon Request	Milwaukee, WI	1989	3 Years	Strategic Planning	1 Week per Year	SpinOff
23	Consumer Bankers Association	Available Upon Request	Washington, DC	1986	4 Years	Strategic Planning	3 Days per Year	SpinOff
24	Training & Simulation Technology Consortium	Available Upon Request	Orlando, FL	1995	1 Year	Rapid Strategic Execution	1 Week per Month	Manning
25	Defense Logistics Agency (US Army)	Available Upon Request	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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