

Tuesday, November 3rd, 2009

Workshop Overview

Purpose of the Workshop Series

The EvaluSys Business Insight & Advice Workshop Series™ provides business owners with the unique opportunity to experience the EvaluSys Business Evaluation™ process and receive valuable business insights in a moderated session. Local business experts will be on hand to provide practical advice and lead roundtable discussions on how business leaders address the business improvement ideas revealed through Evaluation diagnostics.

Focus of this Workshop

This Workshop will focus on the following three areas:

- **Executive Leadership** - Examine your ability to develop, maintain, and communicate a vision and culture for your organization which inspires and motivates all your associates to contribute to the success of your business.
- **Business Planning** – Establish the planning process and disciplines necessary to set goals and objectives, understand and refine your business model, and map your company's path to success.
- **Sales Process** – Organize and execute your selling activities to achieve high conversion rates and predictable revenue flow.

Workshop Location

Ballantyne Business Center, 13850 Ballantyne Corporate Place, Suite 500, Charlotte, NC

Directions from I-77 South:

Take I-77 South to I-485 East, take Exit 61 Johnston Road and turn right onto Johnston Road. Turn right onto John J Delaney then right onto Brixham Hill Avenue. BBC is located in the Hixon building, the middle building of the three building court at the end of the drive.

Directions from I-77 North:

Take I-77 North to I-485 South (which turns into I-485 East), take Exit 61 Johnston Road and turn right onto Johnston Road. Turn right onto John J Delaney then right onto Brixham Hill Avenue. BBC is located in the Hixon building, the middle building of the three building court at the end of the drive.



Tuesday, November 3rd, 2009

Featured Business Advisors

Executive Leadership: **Dan Roberts, President, Development Effects LLC**



Dan Roberts is an accomplished leader and mentor with over 18 years of experience facilitating real, accelerated and sustainable growth for many individuals and organizations.

Dan has made significant contributions to the success of several international service companies by facilitating growth in sales/marketing and building world-class customer/client service programs. Fortune 500 clients include GE, Sun Microsystems, Compaq Computer, Lockheed Martin, AC Delco, ABB, and 3M. His ability to foster positive and productive cultures and relationships has yielded many mutually beneficial partnering relationships for his small and medium size client companies.

Mr. Robert's training, credentials and association memberships include: Coaching University, American Management Association (AMA), Organizational Development Network (ODN), and the Society for Human Resource Development (SHRD).

Business Planning: **Chia-Li Chien, Chief Strategist, Chien Associates LLC**



Chia-Li founded Chien Associates LLC in 1993 and has provided strategies consulting services to companies like, Westinghouse, General Data Comm., Diageo, and many small to mid-size businesses.

Chia-Li received her bachelor's degree from Central Connecticut State University, and her master's degree from University of Hartford. In addition, she is a CERTIFIED FINANCIAL PLANNER™ Practitioner, Chartered Retirement Planning Counselor (CRPC), Charter Trust and Estate Planner (CTEP™), and Project Management Professional (PMP).

She is a board member and a Pro Bono Director of Financial Planning Association of Charlotte. She is an active member of NAWBO, and WPO (Women President Organization). She provides pro bono services in the community along with CharlotteSave, Charlotte Housing Authority and many local non-profit community organizations.

Sales Process: **Bo Boylan, President, Ravenwood Consulting Group, Inc.**



Bo Boylan is President of Ravenwood Consulting Group, Inc., a professional services firm focused on individual and organizational sales effectiveness.

Before starting his entrepreneurial ventures, he served as Chief Operating Officer and Director of Casco International, Inc., a publicly traded services firm. He also serves on the faculty of The American Management Association (AMA) and has authored a variety of publications focused on the areas of sales, marketing, management and leadership. His firm's Diagnostic Sales Strategies sales training platform is used by hundreds of performance driven companies across the United States.

Mr. Boylan currently serves on the boards of the Pamplin School of Business at Virginia Tech, the Charlotte, North Carolina Chamber's executive committee, and Mecklenburg Citizens for Public Education, a local education fund. Mr. Boylan earned his Bachelor of Science Degree in Marketing Management from Virginia Tech, his MBA from Wake Forest University and is currently a doctoral candidate at NC State.



Tuesday, November 3rd, 2009

Workshop Agenda

8:00-8:15 Registration / Coffee

8:15-8:30 Laptop Internet Connection Verification
EvaluSys Profile Chapter Completion

8:30-8:40 Workshop Introduction Tom Bixby, CEO/Founder
EvaluSys LLC

Executive Leadership

8:40-9:00 Complete Chapter Diagnostics

9:00-9:45 Top-5 "Key Opportunities" Roundtable

Featured EvaluSys Advisor Member - Dan Roberts, President
Development Effects LLC

Business Planning

9:50-10:10 Complete Chapter Diagnostics

10:10-10:55 Top-5 "Key Opportunities" Roundtable

Featured EvaluSys Advisor Member - Chia-Li Chien, Chief Strategist
Chien Associates LLC

Sales Process

11:00-11:20 Complete Chapter Diagnostics

11:25-12:10 Top-5 "Key Opportunities" Roundtable

Featured EvaluSys Advisor Member - Bo Boylan, President
Ravenwood Consulting Group Inc

12:10-12:30 **Closing – Q&A – Feedback**