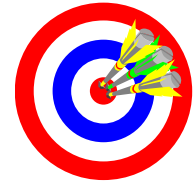


Creating Your Future Success: Strategic Planning



Peak Performance Consulting Group specializes in business strategy for the financial services industry.

- **Strategic Planning:** working with your team to develop focused strategies and implementation plans resulting in measurable bottom line impact
- **Distribution Management:** assessing current branch efficiency, identifying locations that under-perform market potential, targeting highest value locations for investment.
- **Sales Strategy and Information Management:** providing sales and relationship managers the tools they need to target prospects, track cross selling and manage the sales process.
- **Strategic Marketing:** identifying and retaining profitable customers, lowering acquisition cost, and developing products to attract profitable market segments.

Strategies

The business world is changing more rapidly than ever. New competition. New technology. Higher investor expectations. CEOs are being asked to respond quickly to new and uncertain conditions.

But the most effective organizations don't just identify and fix problems -- they identify the future results they desire and create solutions to achieve them. And they implement rapidly and effectively. Yet, in spite of this, *Fortune* reports that only 10% of strategies are effectively implemented.

Peak Performance Consulting Group works with you to develop and implement focused strategies to improve your competitive position – and your bottom line. We assist through all phases of the project, including implementation, progress monitoring and staff communication.

Planning Model

“Last year plus 10%” isn’t good enough anymore.

Unlike traditional planning, which start with past results and look to achieve small incremental gains, we use an Aspiration Planning Model which begins with a vision of the future we need to achieve and then “rolls back” this future goal into actions required to accomplish these objectives.

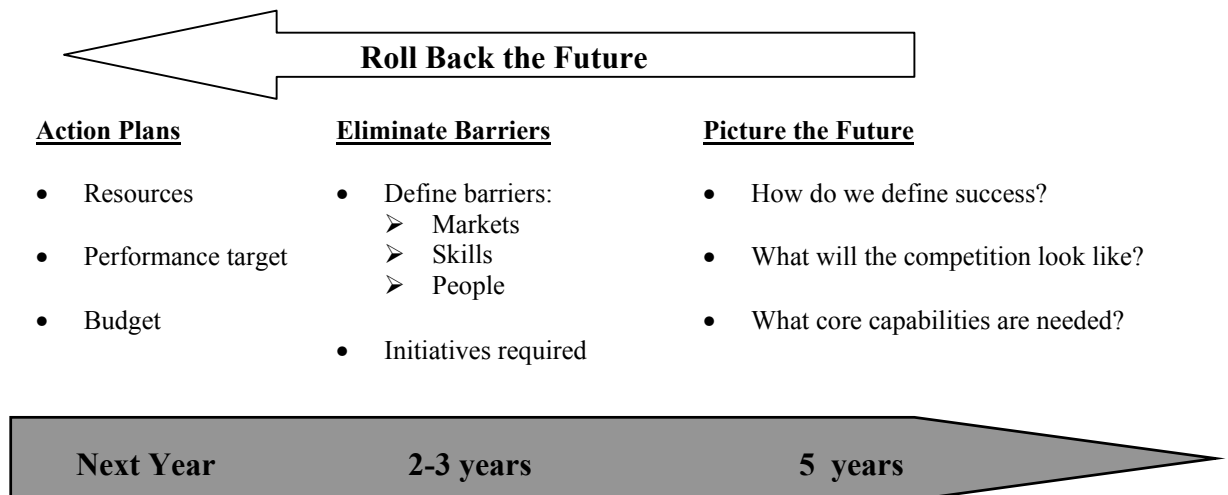
We work with the senior management team to identify their critical business objectives, lead strategic planning sessions, and assist with identifying the resources and infrastructure needed to accomplish these objectives.

Plan Implementation

A good plan effectively implemented is far superior to a great plan document which sits on a shelf and is not a living part of your business. After all, the purpose of your plan is to help you achieve desired business results. Your business is not static but is dynamic and changing – your plan needs regular review and update to insure it is relevant and effective.

Peak Performance Consulting Group facilitates management planning sessions, and works with each department to help them develop specific implementation plans. We can help create communication programs to insure that all employees and the Board understand your vision, and are kept informed of on-going progress towards goal.

Planning Model



For additional information, please contact:

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