



7-Step Execute Your Vision System Henderson Automotive Family

Presented to:

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Client Request

Henderson Automotive Family has two locations in Webster, NY (Webster Chrysler Jeep and Webster Ford, Lincoln, Mercury) with approximately 85 employees. There are five functions: sales, service, parts, body shop and administrative support. At a time when the industry is not at its peak, the dealerships are seeking solutions to maximize revenue and minimize unnecessary expenditures -- while improving the focus on staff and customer satisfaction and loyalty.

The need for staff unification and empowerment is at an all time high. For the company to excel, everyone in the organization must be on the same page, with a common vision, equipped with knowledge to drive, as a team, to success.

Shared Results International has been asked to implement its *7-Step Execute Your Vision System* -- the world's only sustainable business success program. This integrated method introduces seven essential strategic components for engaging everyone's talent to achieve organizational success: 1) SharedVision, 2) SharedDirection, 3) SharedAccountability, 4) SharedInitiatives, 5) SharedSkills, 6) SharedPerformance and 7) SharedRewards.

SharedMomentum (known as MO) is a web-based system that enables the *7-Step Execute Your Vision System* to be sustained over time and to continue to build in effectiveness. Henderson Automotive Family will serve as a pilot organization for the implementation of MO in the automotive industry.

The objective of this joint effort between Shared Results International and Henderson Automotive Family is to ensure that the staff is fully unified with a vision and has the knowledge, freedom and support to achieve remarkable goals and objectives.

Our Worldview

If you are willing and able to create a disciplined communication and accountability culture you can execute your vision with outstanding results.

Project Description

Preparation

Shared Results International (SRI) will work with the General Manager / Owner of Henderson Automotive Family to create a detailed action plan that ensures effective use of the allotted staff time and achieves the desired outcomes. At a minimum, the preparation phase includes assisting or implementing the following:

- **General Manager:** Provide background and support materials to SRI (organizational chart, staff email list, store/company information including goals and targets). Send letters to managers and all participating staff, communicating the desired outcomes of the project, the process involved, and what is expected of them as vital players in this Execute Your Vision project.
- **SRI:** Review dealership materials; create introductory package for managers and staff to include a letter from the GM, timeline and process charts. Also, work with the general manager / owner to ensure his goals, objectives, and targets are effectively articulated and understood by SRI.
- **Participants:** Prepare for the project by reading the advance materials and begin thinking of ways to assist in helping the organization achieve its vision.

Assessments

SRI will conduct interviews with the owner, each manager and key support individual to assess how they see the vision, challenges and potential solutions that face the company. Employee roundtables will be held with the attendee makeup being carefully constructed so that all functions, levels and geographic locations are represented. From the results of the interviews, a *Voice of Employee* survey will be created and disseminated. A comprehensive report will be developed that provides detailed findings and insightful analysis on the culture and capability of the Henderson Automotive Family environment. The results, recommendations and critical success factors will be presented to the management team. They will also be shared with all employees through a method determined by management.

Each manager and team leader will take the DiSC Personal Profile Analysis and will participate in an individual de-briefing on the findings and how they apply to the individual. Some or all of the rest of the staff may complete a Classic DiSC profile, followed by a team session to learn how to apply the information, as deemed appropriate by the respective manager.

Step I – SharedVision

Shared Results International (SRI) will facilitate the entire team's effort in defining or refining a vision that focuses their efforts in a way that supports Henderson Automotive Family's ultimate goals and becomes one which they can fully embrace, support and get excited about. This will entail initially working with the executive team to articulate the vision, mission, strategic goals and organizational values in a 3-hour session. This will be followed with several large group, 2-hour sessions to ensure the entire staff is on board and has a chance to contribute.

Step II – SharedDirection

SRI will lead mini sessions between managers and their respective teams to clarify the roles each employee has and establish individual Change Goals – articulating what each individual will do to “significantly help the organization succeed within the next six months”. Manager coaching and training will be integrated into the sessions to ensure the process can be replicated with future employees and will create a sustainable repeatable method of tapping into the talent, skills and minds of every individual within the company.

Step III – SharedAccountability

SRI will train each team in the accountability / communication methods to support these Change Goals. This includes three reporting / sharing mechanisms: monthly status report, one on one meetings with the manager, and department / team meetings. As the SharedMomentum (MO) application is implemented, this phase becomes more easily enabled with the automation, making it possible to focus the critical issues, eliminate inter-departmental barriers, and sustain momentum for initiatives.

Step IV – SharedInitiatives

SRI, working with the management team and staff, will create a system that captures employee’s ideas – specifically when they foresee a problem arising or they have an idea that could benefit the company. The SharedMomentum (MO) site will serve as the core repository and method of tracking, reporting, and communicating to ensure adequate implementation.

Step V – SharedSkills

SRI will implement the *AlignedResults System* for tying learning of skills to achieving business objectives. Working with managers, SRI will provide management skill development, with specific emphasis on strategic interpersonal skills in the areas of leadership, sales and customer service. This module includes a personal profile for managers, supervisors and key individuals, along with e-learning courses for reinforcement, retention and ongoing application.

Step VI – SharedPerformance

SRI will train the teams in when and how to effectively evaluate progress towards the organizational goals – and how the individuals have contributed to the success. This includes specific measurements of outcomes and effort.

Step VII – SharedRewards

SRI will facilitate the establishment of a SharedRewards culture that celebrates successes in a variety of ways – from a star on the bulletin board to a group picnic; from a team song to comp time or a monetary prize.

SharedMomentum (MO)

SRI will implement an integrated communication and project management system that has every employee involved in the organization’s success to sustain the initiatives.

Roles and Responsibilities

Linda Keefe, Shared Results International, is responsible for:

- ▶ Working towards total and complete buy-in from managers and employees alike.
- ▶ Utilizing technology (email, internet webinars, voice over PowerPoints) to deliver messages and training in a time-efficient manner.
- ▶ Overseeing the entire project, working shoulder to shoulder with every manager and staff person in the company.
- ▶ Providing insight and consulting services for creating an environment of full employee engagement to execute the organization's vision.

Randy Henderson, Henderson Automotive Family, is responsible for:

- ▶ Fully supporting and participating in the project from beginning to end which includes communicating with all staff about the project, making sure each has time to participate, and works to create a culture of *SharedKnowledge* – where every employee has the knowledge, freedom and support to help the organization succeed.
- ▶ Creating an environment of openness, honesty and support and becoming a model for others to emulate by working with SRI and personal coaching.
- ▶ Provide support and server capability to implement the SharedMomentum (MO) web-based method for sustaining the SharedKnowledge culture.

Shared Results International

Shared Results International is a strategic consulting company that helps organizations execute their vision -- providing assessments, facilitation and training. Known for the *7-Step Execute Your Vision System*, we've coined the term *organizational indifference* and are leaders in creating an environment of totally focused, 100% employee engagement.

Having worked with such notable clients as Department of Labor's Job Corp and the National Credit Union Administration; Kodak, Xerox and the NYC Transit Authority; Brooklyn Public Library and the New York Philharmonic, Shared Results International brings a breadth of experience and knowledge to companies large and small, in every sector – public, private and non-profit.

Shared Results International has a proven record of results. Client examples include: employee satisfaction scores for communications improved 34%; average IT response time dropped from 17 days to 3; Federal inspection rating increased from 128 to 399 (out of a possible: 400).

Tasking, Schedule and Cost

Phase	Task	Staff Time Reqts	Time Line	Cost
Prep.	Info Review	1 hr – GM	August	--
Assess	Interviews/Roundtables/Survey/Report/Presentation	1 hr - per individual (~12 intvs; 2 roundtbls)	September	\$9,700**
I	SharedVision	2-3 hr – per individual (1 Exec; 4 emp. group)	September	\$9,600**
II	SharedDirection	1-2 hr – per individual (10 sessions)	October	\$11,900**
III	SharedAccountability	1 hr / ind; 3 hr / mgr	Oct - Nov	\$4,500**
IV	SharedInitiatives	In Team Meetings (10)	December	\$3,700**
V	SharedSkills	2 hr – per individual	Sept - Dec	\$8,400**
VI	SharedPerformance	In Team Meetings (10)	October+	\$2,400**
VII	SharedRewards	In Team Meetings (10)	October+	\$3,700**
MO	SharedMomentum	1 hr / ind; 3 hr / mgr	~ Jan 30	Set Up Included*
TOTAL		~ 8-11 hr / individual; ~ 15 - 18 hr / manager		\$53,900 ** See below

Terms and Conditions

- Monthly retainer paid each month by the 5th and continues through project implementation or until paid off. (Estimated length five months.)
- Balance of funds to be paid through some combination of barter and shared risk (percent of growth / sales / gross profit) -- the specifics to be determined by Henderson Automotive.
- Any shared risk arrangement will be jointly reviewed each quarter, paid by 15th of following month.
- Maintenance cost of SharedMomentum will be grandfathered in for a nominal cost.
- Cancellation of the program can be done at any time, by either party.
- On-time payments will be free of finance charges. 18% (annual percentage rate) on unpaid balances after due date.

Guarantee

We guarantee that you will be absolutely delighted with the final product, the interaction that we have with your people, and the smooth and efficient processes that we employ. Payment is totally contingent on your complete satisfaction.

CLIENT ACCEPTANCE

Signed _____ Title _____ Date _____
Company Representative