

Strategic Career Preparation
The Internship Program
Orange County, CA

PROGRAM PROFILE

(Cloud Based)

“Succinct, Rapid, Fluid”



**STRATEGIC
PERFORMANCE
INSTITUTE**



First Dynamic Business Solutions, Inc.
18332 Gramercy Drive
North Tustin, CA 92705
(714) 768-2815
LeeG@BusinessSolutionsOC.com
BusinessSolutionsOC.com

Strategic Internship Candidate,

Thank you for your interest in the Strategic Career Preparation Internship Program. With the increase of colleges 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 in 2015 we've been instrumental in "pro-actively" coordinating job interview strategies for more than 40 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 of conspicuous preparation for every component of their job interview cycle.

Our Mission for each intern is to become "The Most Focused, Most Organized, Most Prepared" in direct comparison to every interview candidate to date. We're here to help.

In the Spirit of Continuous Growth and Learning,

A handwritten signature in black ink, appearing to read "Lee Greytak", is written over a light blue circular watermark that contains the text "First Dynamic Business Solutions, Inc." and "© 2015".

Lee Greytak

CEO

First Dynamic Business Solutions, Inc.



“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 while augmenting their academic studies.

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

- A “Real-World” Working Strategic Career Plan Focused on Growing Your Future, Hard-Copy Updates to Validate and Measure Forward Progress-On Plan.
- Monthly “In Depth” 1:1 Strategy Review to Incorporate Changes in Progress.
- Job Interview Strategy & Plan Providing a Competitive Advantage Despite Limited Job Experience.



Lee Greytak
CEO
First Dynamic Business Solutions, Inc.
Alumni / 1973 CSUF / Accounting

A Unique Concept...

- So Much More Than Just Another Internship Experience Program Focused to a Particular Job Function.
- Hard-Copy of Your Updated “Working” Strategic Career Plan Provided at Monthly Training and Career Development Meetings.
- Involved in Collaborative Input in CEO & CFO Meetings on Real World Business Issues and Presentations.

Special Invitation

Monthly

ZOOM Meeting

* Peer Advisory Forum

* CFO Forum

* Training & Career

Development Meeting

* 1:1 Meeting

(Meeting with CEO & CFO’s
with Interns)

RSVP

LeeG@BusinessSolutionsOC.com



“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 while augmenting their academic studies.

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 Intern Team ranges from 6 to 12 Interns in “The Program” at any one time depending on Intern Semester Schedules and our 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.

The 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 Focused, Most Organized, 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 and financial officers 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. Friday’s are the highest priority as they participate in a monthly Peer Advisory Forum Membership Meeting.

Key Elements of The Program

- * Professional / Personal Branding * Meeting Attendance Strategy * Strategic Career Planning
- * Competitive Business Competency 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.



SCP Program Team Directory

Kaizen

Date: 10/22/2020

A	OPS-Team	Major / Graduation	Location	Joined	A	B	C	D	Rkng.	Origin
0	Pete Johnson	Strategic Consultant	Laguna Hills	01/30/15	4.9	4.9	4.9	3.0		SPI
1	Rene Rojano	Marketing - 5/2018	NPB	06/07/17	Tom	H4K	Daniel			CSUF
2	Angel Mendoza	Finance - 5/2019	Garden Grove	05/31/19	Steve					CSUF
3	Caleb Sachs	Marketing - 5/2020	Costa Mesa	07/24/20	Shaul	Adam	Daniel			CSUF
4	Jennifer Icaro	Marketing - 12/2021	Bellflower	08/31/20	H4K	Shaul	Adam			AMA
5	Brandon Kessler	Marketing - 5/2021	Irvine	08/31/20	Lee	H4K	Adam			Jessica
6	Maxwell Boscardin	Marketing - 12/2021	Laguna Niguel	08/31/20	Shaul	Adam	Tom			AMA
7	Thomas Park	Marketing - 5/2021	Corona	08/31/20	Lee	Adam				AMA
8	Maria Macias	Marketing - 5/2021	Santa Barbara	08/31/20	Lee					AMA
9	Salim Tarzi	Finance - 5/2021	Aliso Viejo	08/31/20						AMA
10	Leon Phung	Marketing - 12/2021	Midway City	09/07/20	Steve					AMA
11	Evan Carol	Risk Mgt. - 5/2021	Villa Park	09/07/20	Lee	Tom				AMA
12	Josh Low	Marketing - 12/2020	Pleasanton	10/12/20						AMA
13	Billy Sereyvuth	Marketing - 5/2021	Santa Ana	10/18/20						AMA
B	PAF Members	Company	Location	Joined	A	B	C	D	Rkng.	Origin
1			Tustin	02/25/15	Brandon	Evan	Thomas	Thu.		Past
2			Irvine	01/01/17	---			---		DGR
3			Newport	06/01/17	Brandon	Maxwell	Caleb	Fri.		DGR
4			Laguna	12/01/17	Rene	Evan	Maxwell	Fri.		DGR
5			Anaheim	05/01/18	Angel	Leon		Thu.		Tom
6			Dana Point	04/01/19	Rene	Brandon	Jennifer	Thu.		SPI
7			Irvine	03/15/20	Caleb	Maxwell	Jennifer	Fri.		David H.
8			Lake Forest	09/01/20	---			---		Eric O.
9			Indo	09/15/20	Rene	Caleb	Brandon	Fri.		Rene R.
E	Total Interns	Major / Graduate	Location	Joined	Final	B	C	D	Ranking.	Origin
1	Fiona Tang	Marketing - 5/2017	Santa Monica	10/01/15	07/21/17					CSUF
2	Andrew Manliguez	Marketing - ???		10/01/15	05/21/16					CSUF
3	Jon Maher	Marketing - 5/2016		01/01/16	05/21/16					CSUF
4	Devin Masterson	Marketing - 5/2016		01/01/16	05/21/16					CSUF
5	Vitor Choi	International Business	Brazil	01/02/16	01/25/16					CSUF
6	Brian Humphreys	Marketing - 12/2018	Torrance	02/09/16	05/24/19					CSUF
7	Neo Rochlen	Supply Chn. - ???	Torrance	03/01/16	06/15/17					CSUF
8	Ryan Tamashiro	Finance - 12/2016		06/01/16	03/17/17					CSUF
9	Tevin Trujillo	Marketing - 12/2017		03/16/17	06/15/18					CSUF
10	Brandon Poore	Finance - 5/2016		03/26/17	09/08/17					CSUF
11	Alex Vasquez	Marketing - 12/2018	Whittier	03/29/17						CSUF
12	Alejandro (AJ) Vaca	Entrep. - 5/2018		04/28/17	05/01/18					CSUF
13	Rene Rojano	Marketing - 5/2018	Fullerton	06/07/17	06/15/18					CSUF
14	Kien Bui	Operatns. - 5/2019		06/08/17	12/15/17					CSUF
15	Yumi Liang	Intl. Bus - 5/2018	Los Angeles	08/25/17	06/15/18					CSUF
16	Jonathan Nguyen	Marketing - 12/2017		09/08/17	12/15/17					CSUF
17	Sokunthea Mao	Marketing - 12/2018	Santa Ana	11/03/17	05/24/19					CSUF
18	Chloe Cao	Hospitality - 5/2018	China	03/16/18	06/05/18					CSUF
19	Josh Aceves	Ace Construction	Anaheim	12/20/18						Mike A.
20	Sarah Hertzberg	Marketing - 5/2020	Orange	02/05/19						Steve
21	Phong Duc Tieu	Accounting - 12/2020	Diamond Bar	03/21/19						Rene
23	Nick Herbert	Marketing - 5/2019	Yoba Linda	04/04/19						Sam
24	Kai Iseda	Entrep - 9/2020	HB	04/09/19						CSUF
25	Miguel Ponce	Business - 12/2019	NPB	04/09/19						CSUF
26	Daniel Cazares	Entrep - 5/2018	NPB	04/09/19						CSUF
27	Johanes Weniger	Web - 9/2019	Fullerton	04/09/19	05/31/19					CSUF
28	Jessica Brownfield	Criminal Justice - 5/2020	Fullerton	08/23/19						CSUF
29	Mike Chen	Data Science - 5/2020	Los Angeles	09/08/19						USC
30	Nick Hatanaka	Marketing - 5/2017	Laguna Hills	09/09/19						Steve



Internship Comparison Evaluation

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Name:

Date: 2/1/2020

School / Major:

Graduate:

No:	Internship Comparables	Location / Dates				
A						
B						
C						
No:	Evaluation Criteria	Your Prity.	A	B	C	D
01	Resume's Future Prestige-Value					
02	Caliber of Team Interact With Daily					
03	Level of New Network Contacts Developed					
04	Competitive Career Advancement Skills					
04	Mentoring Value					
06	Head Start at Targeted Career					
07	Job Potential Immediatey 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



Intern Interview - Key Questions Checklist

Kaizen

Date: 2/1/2020

No:	Key Questions	X	Comments
1	Resume, LinkedIn Profile? (PDR)		
2	Your Major, Graduation Date, Location?		
3	Post Graduate Career Goals?		
4	Hobbies, Intrests?		
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 Avialibility?		
13	If we were to work together, what would you see as our next step moving forward?		



Performance Observation Evaluation

Kaizen

Name:
Position:
Manager:

Tenure:
Date:
2/1/2020

Observable

Updated Job Description:

	(Self)	(Obsv.)	(Comments:)
CONSPICUOUS PRIDE OF ENGAGEMENT:			
First to volunteer for every key initiative. The "Go-To" person. Gets things done well ahead of schedule.	3.5		
CONSPICUOUS ATTENTION TO DETAILS:			
Notices everything in their arena. Attention to details. Never misses an opportunity for continuous improvement.	3.5		
CONSPICUOUS TEAM CATALYST:			
Infuses a great attitude into everything they do. Raises the level of everyone's game they work with. Their team becomes a better working unit through their presence. Gives a helping hand when needed to other department members.	3.8		
CONSPICUOUS RAPID FOLLOW-THROUGH:			
Does what they said when they said. Gets things done constantly ahead of schedule. 110% Reliability.	3.5		
OVERALL AVERAGE SCORE:			

ACTION PLAN: (1-3 specific actions or changes to focus on in the next 3 months)

- 1.
- 2.
- 3.

5	(Rock Star)	
4	(Very Good)	
3	(Only Average)	
2	(Grow or Go)	
1	(Sacked 6 Months Ago)	

KAIZEN
"The Relentless Pursuit of
Continuous Innovation and
Improvement"

CONFIDENTIAL

Sample

Susan Smith
SH, Inc.
Laguna Hills, CA

2020 "Working"
Strategic Career Plan

Rapid Military Execution of Your Business Strategy...
"When Your Strategies and Plans Just Can't Afford to Fail!"

Monthly Update
February 2020

"Succinct, Rapid, Fluid"

So What's Your PLAN? Don't Tell Me... Show Me!

(Cloud-Based)

Revision: **2/1/2020**

Phase II

Strategic Execution Coordination

Dr. Pete Johnson

Pete@StrategicPlanning.com

(949) 233-5566

(WIFI Code: PJHome3113)





Core-Team / Follow-Up Schedule

Kaizen

Date: **10/22/2020**

A. Peer Advisory Forum (PAF):

- 1. Lee Greytak **10/30F'**
- 2.
- 3. **11/6F'**
- 4. **10/26M'**
- 5. **11/4W'**
- 6.
- 7. **10/23F'**
- 8. **11/9M'**
- 9. **---**
- 12. **Th,F**

- 1. Forge Media **---**
- 2. PAF Meeting **11/12T,F**
- 3. OPS Team **10/22Th,10/29T**
- 4. Bus. Forum **10/27T**
- 5. AMA - Forum **10/28W**
- 6. Lee - Forum **10/21W**
- 7. Tom - Forum **11/11W**
- 8. Adam - Forum **---**
- 11. Angel Mendoza **M-F**

B. OPS Team (OPS):

- 1. Rene Rojano **T,W,F**
- 2. Caleb Sachs **M-F**
- 3. Brandon Kessler **M-F**
- 4. Thomas Park **M-F**
- 5. Maxwell Boscardin **M-F**
- 6. Jennifer Icaro **M,W,F**
- 7. Maria Macias **T,Th,F**
- 8. Leon Phung **M,T,Th,F**
- 9. Salim Tarzi **M,Th**
- 10. Evan Carol **T,Th,F**

C. 2020 Meeting Schedule:

All Dates Subject to Change

Details

# 97	Nov 14-15, 2019	Thursday	PAF Annual Retreat (2-Days)	8:30 AM
# 121	Aug 21, 2020	Friday	PAF Monthly Membership Meeting	10:00 AM
# 123	Sep 8, 2020	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 124	Sep 18, 2020	Friday	PAF Monthly Membership Meeting	10:00 AM
# 125	Sep 22, 2020	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 126	Oct 13, 2020	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 127	Oct 16, 2020	Friday	PAF Monthly Membership Meeting	10:00 AM
# 128	Oct 27, 2020	Tuesday	OC - Business Forum Zoom Meeting	8:00 am
# 129	Nov 10, 2020	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 130	Nov 12, 2020	Thursday	PAF Annual Retreat (2-Days)	8:30 AM
# 131	Nov 24, 2020	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 132	Dec 8, 2020	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 133	Dec 18, 2020	Friday	PAF Monthly Membership Meeting	10:00 AM
# 134	Dec 22, 2020	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 135	Jan 12, 2021	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 136	Jan 15, 2021	Friday	PAF Monthly Membership Meeting	10:00 AM
# 137	Jan 26, 2021	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 138	Feb 9, 2021	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 139	Feb 19, 2021	Friday	PAF Monthly Membership Meeting	10:00 AM
# 140	Feb 23, 2021	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM
# 141	Mar 9, 2021	Tuesday	OC - Business Forum Zoom Meeting	8:00 AM



SCP - On Boarding Check-List

Kaizen

Rene

Date: 2/1/2020

No:	FOLLOW-UP ACTION ITEMS	Status	Verified		Wingman	Date Listed
01	Your Travel Location					09/13/19
02	Current Days of Week Available (11:00 - 3:00)					09/13/19
03	Dress Code - PAF, 1:1, OPS Team Meetings					09/13/19
04	Arrival Process - Parking, Rapid Arrival, Your Set-Up, No Bags in Mtg.					09/13/19
05	Lunch Issue					09/13/19
06	Always Bring - Laptop (Full Charge), SCP Report, Journal, Pen, Power Cord					09/13/19
07	WiFi Access - Set-Up					09/13/19
08	Non-Disclosure Agreement (NDA)					09/13/19
09	SCP Report - Guest Set-Up, Access, CCI List (Top 10)					09/13/19
10	Your OPS Meetings Schedule - Next 2 Weeks					09/13/19
11	GroupMe Set-Up - In Route, Oso					09/13/19
12	Rapid Reply All Key Emails / Text / GroupMe - Received					09/13/19
13	Business Cards, How to Present					09/13/19
14	Your Meeting Introduction - Wording					09/13/19
15	Printer Access Set-Up - Laptop, Cell Phone					09/13/19
16	PR Photo - Update					09/13/19
17	Cloud Folder Set-Up - SCP, etc.					09/13/19
18	PAF Website Set-Up - PR Photo, LinkedIn Link, Bio					09/13/19
19	Email Signature Set-Up - PR Photo, Contact Details					09/13/19
20	LinkedIn Profile Updates - PR Photo, Background, Summary, etc.					09/13/19
21	OPS Team - 5 Functions					09/13/19
22	New Intern Data Updates - All ETD, CTFS					09/13/19
23	No Laptops on Table Unless Specified					09/13/19
24	Assigned Intern Wingman / Mentor					09/13/19
25	PAF Member Assignments					09/13/19
26						
27						
28						
29						
30						
31						
32						
33						
48						



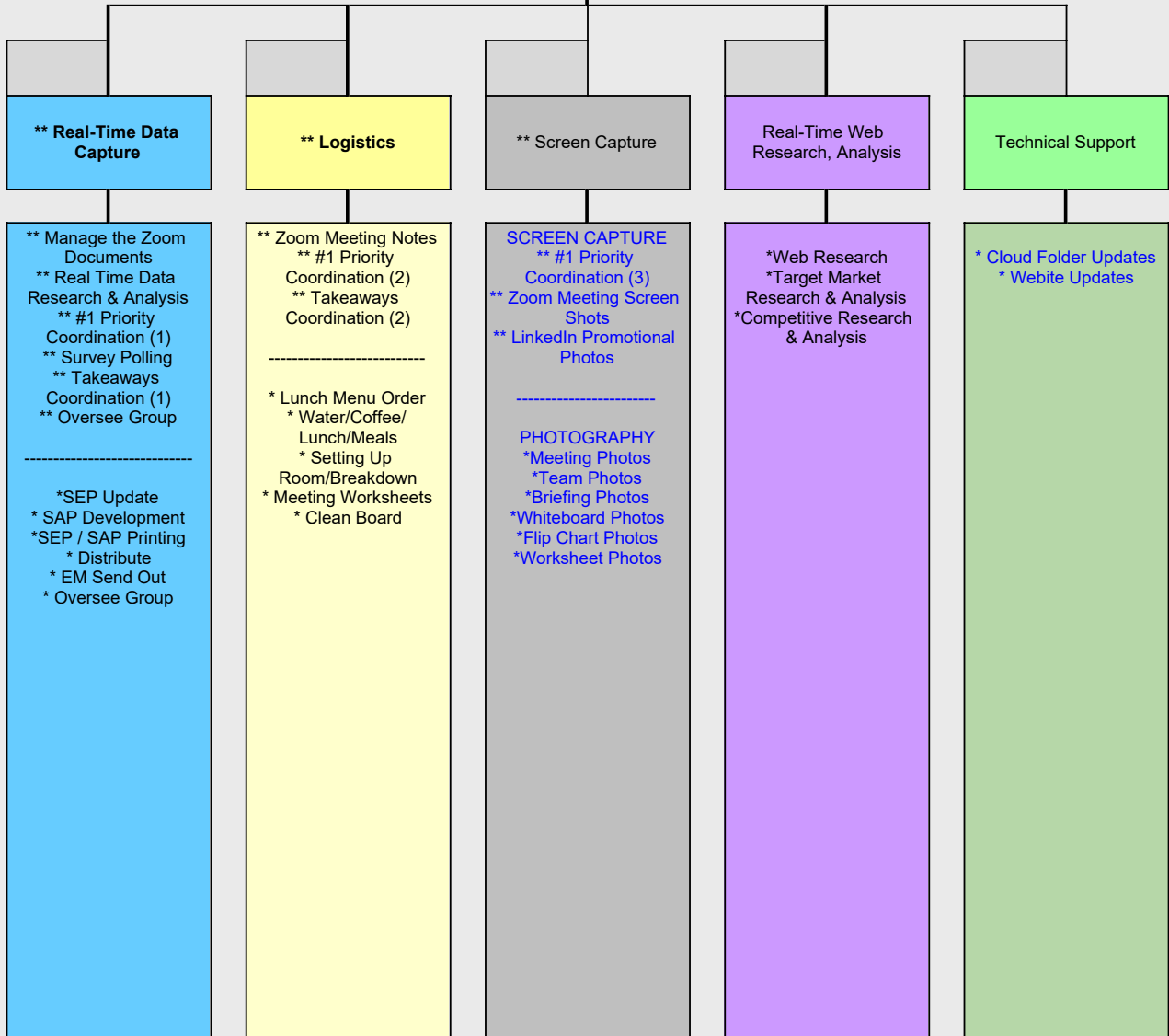
OPS - Functional Org. Chart **Kaizen**

** COVID Period

Date: 10/22/2020

Lee Greytak

Rene





Strategy Action Plan - Proposed

Kaizen

Topic: Job Interview Strategy

Date: 2/1/2020

Team: A Lead: Jonathan Wingman: Tevin Team-Mates: AJ, Pete

A. Strategic Objectives / Goals:		Initial Draft: 3/19/2017		
1.	Demonstrate a Conspicuous Competitive Advantage as the Most Organized, Most Prepared			
2.	Continuously Kaizen the Interview Skills and Strategy			
3.	Secure a Job Position of Choice at the Highest Possible Starting Compensation Package			
B. Additional Critical Issues / Challenges:		D. Key Elements: (Show Me)		
1.	Limitations in Past Job Experience	1.	Resume, LI Profile, Cover Letter	
2.	Direct Initial Contact with Top Decision Makers	2.	Preliminary Due Diligence Report - PreMeeting	
3.	Volume of Talented Experienced Competitors	3.	"Working" Strategic Career Plan, SEP Sample	
C. The Ideal Game Plan:				
1.	Professional Branding - "THE Specialist"	7.	"Working" Strategic Career Plan (SCP)	
2.	PR Photo - "THE Specialist"	8.	Preliminary Due Diligence Report - Template	
3.	Resume - CV, "Preliminary Draft"	9.	Interview Questions - Mine, Theirs	
4.	LinkedIn Profile as CV, 500+	10.	Sample (Team-Leader) Project (SEP)	
5.	Testimonials - Hard-Copy Portfolio	11.	Cover Letter	
6.	LinkedIn Postables - White Papers, Graphics	12.	Ideal Follow-Up Email - Wording, 4 Hours	
E. Follow-Up Actions:		Lead	Wingman	Date
1.	LinkedIn CV Profile Design, Set-Up	Jonathan	Tevin	TBD
2.	Interview Questions Page - Mine, Theirs	Jonathan	Tevin	TBD
3.	Letters of Recommendation	Jonathan	Tevin	TBD
4.	PDR - LI Profiles, Website, Glass House	Jonathan	Tevin	TBD
5.	Post Interview Follow-Up Email Wording	Jonathan	Tevin	TBD
6.	LinkedIn Hunting Strategy, Competency	Jonathan	Tevin	TBD



Job Description - Operations Assistant

Kaizen

Date: 2/1/2020

04	We are looking for a new detail oriented Operations Assistant to support the CEO and oversee all operations. You will manage mostly business related tasks for the team such as taking inbound calls, receiving / formating / sending proposals to clients, tracking labor hours, creating reports, and other organizational tasks. To do this role properly you should have a detailed understanding of the full Microsoft Office suite, high level of competency with a computer, be extremely fast at solving problems and preferably have experience as an administration assistant in the past.			
05	What You'll Do:	A	B	<u>Comments</u>
06	Answering phones and routing calls to the correct person or taking messages.			
07	Managing Client Cost Estimates			
08	Filing and retrieving corporate records, documents, and reports.			
09	Researching and conducting data to prepare documents for review and presentation by boards of directors, committees, and executives.			
10	Helping prepare for meetings.			
11	Recording Labor Hours			
12	Work Order Printing			
13	Using various software, including word processing, spreadsheets, databases, and presentation software.			
14	Reading and analyzing incoming memos, submissions, and distributing them as needed.			
15	Pickup Mail at Post Office			
17	Send Thank You Cards			
18	Opening, sorting and distributing incoming faxes, emails, and other correspondence.			
19	Provide general administrative support.			
20	What You'll Bring to Succeed:			
21	In-depth understanding of entire MS Office suite.			
22	High school diploma. (some college preferred)			
23	Ability to organize a daily workload by priorities.			
24	Must be able to meet deadlines in a fast-paced quickly changing environment.			
25	A proactive approach to problem-solving with strong decision-making skills.			
26	Professional level verbal and written communications skills.			
27	Must have a valid DL license			
28	Must have personal computer to use while at work			
29	Proven strong problem solving, analytical and decision-making skills			
30	Adaptability to fast-paced change			
31	Friendly customer service attitude, highly responsive, self-motivated, and able to act on own initiative			
32	Ability to prioritize and handle multiple tasks and learn new tasks quickly, organizational skills a must			
33	Ability to meet tight deadlines, work well under pressure, and maintain professionalism and quality of work			
34	Ability to work independently with minimum supervision			
35	Light Up My Holiday is a full-service holiday lighting and decor company serving the Greater Orange County and Los Angeles Areas. Over the years we've worked on such notable projects as the Irvine City Hall, Saddleback Church and Kim Kardashians very own private Holiday Party. Our creative and innovative lighting displays bring joy and magic to the holiday season. We have been serving the area for over 15 years. Anaheim, CA - Hours: 8:00 - 5:00			



"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.

Skill	Rating		Skill	Rating	
	A	B		A	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
---	---

C. Top-3 Priorities
1. _____
2. _____
3. _____

D. Key Strategic Improvements
1. _____
2. _____
3. _____



BRANDING "TOUCH-POINT" ANALYSIS (BTA)

Kaizen

Date: 2/2/2020

"Conspicuous Competitive Advantage"

No:	Touch-Point	Rating	Role-Model	Kaizen for Improvement
1	The Ideal Prospective Customer <i>"Succinct Statement"</i>			
2	Brand Specialty Determination <i>"I Know a Guy", "The Specialist"</i>			
3	Tagline - Unique Competitive Advantage, <i>"Meeting Specific"</i>			
4	PR Photo - <i>"You Are The Brand"</i> Office, Team, Projects			
5	Email - Address, Signature, Photo, Tagline, Links, Etc.			
6	Linkedin Profile - Initial Contact Branding Promo., <i>"Meeting Specific"</i>			
7	Business Card - <i>"Meeting Specific"</i> , Back Side, Exchange Process			
8	1st Impression - Dress, Appearance			
9	Personal Introduction - <i>"Meeting Specific"</i> , No Elevator Pitch			
10	Rapid Email Follow-Up - Wording, CC			
12	Raving Fan Referral Email Template - Wording, LI Profiles (2), JPEG			
16	SME Guidebook as Brand Credibility, PDR			
17	Social Media Posts Template - LI, FB, Instagram, Twitter			
18	Client Project Samples, PDR			
19	Showcase Demonstration, Take-Aways, Pass Along			



Strategy Action Plan - Proposed

Kaizen

Topic: LinkedIn IC Branding Strategy

Date: 2/1/2020

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



Rapid Execution Accountability System

Kaizen

Member Name - Month Of: October

Date: 9/30/2020

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.			



"California Internship Guidelines"

Kaizen

7/11/2018

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's 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.*

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For Your Convenience Call Me At: (714) 768-2815 – LeeG@1stDynamic.com - www.BusinessSolutionsOC.com
It's been said... "If You Don't Know Your Numbers... You Don't Know Your Business" - based on what's been happening in 2020 to date, nothing could be more true. If ever there was a time when rethinking and recalibrating the way in which you do finance and accounting for your company or business, this might be a critical next step, today is that day. Perhaps we could help.

5 Key Elements:

1. Strategic Business Performance Analysis - QuickBooks is great for viewing archived information. However, being able to understand financials, trends & metrics is essential for adapting your strategies as you go forward.
2. Cash Flow and Break-Even Analysis - Managing your cash, increasing revenue & tracking expenditures is essential in managing operations & expense reduction.
3. Leadership Team Strategic Priorities & Follow-Through - Regular weekly staff meeting are critical component of a highly organized business. A strategic priority review keeping everyone focused and on the same page.
4. Key Client (Customer) Outreach - Deliver more than you promise. Find what



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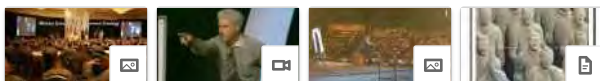
For Your Convenience Contact Me At: (949) 233-5566 - Pete@StrategicPlanning.com - www.PeerAdvisoryForum.com - www.StrategicPlanning.com... The 5 Reasons Why 99% of All Strategic Business Plans Fail and How to Fix Them... FAST.

It's been said that 'Even a Fool with a PLAN will always be better off than a Genius without a Plan'. Ask any successful corporate CEO, Entrepreneur or start-up business owner and they couldn't agree more. But understandably, Planning is not for everyone as it tends to showcase a business leader's "Depth of Competence" (or on the flip-side perhaps a lack there of...).

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

The 5 Most Common Problems:

- #1. No Written Business Plan - These so called "1-Page" Strategic / Business Plans outlining very optimistic 10X-type goals may look like an interesting concept, BUT in reality WITHOUT an agile '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 fixed Plan survives very long in today's ever changing business arena. The critical key is an agile Plan infrastructure.



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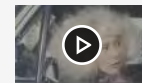
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Dr. Pete Johnson
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Experience



CEO

The Peer Advisory Forum
Jan 2015 – Present · 4 yrs 9 mos
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:
[... See more](#)



+4



Student Internship Program

Executive Director
Dec 2014 – Present · 4 yrs 10 mos
Laguna Hills, California

Facing college graduation with concerns of your prospects of landing your career job of choice? Is a lack of real-world, industry-relevant business experience a potential void on your job resume? With so many graduating seniors flooding the job market, how can you demonstrate your competitive professional competencies?... [See more](#)



Rene Rojano
Specialist in Business Development and Strategic Execution Systems

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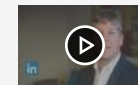
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You both work at The Strategic Performance Institute

Rene started at The Strategic Performance Institute 38 years and 4 months after you did

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About

For Your Convenience Contact Me At: (714) 579-9787 - Rene@PeerAdvisoryForum.com - www.PeerAdvisoryForum.com - www.StrategicPlanning.com - The 5 Most Common Challenges Facing Businesses Professionals' Today and How to Fix Them... FAST.

It's been said that 'A Fool with a Plan will always be better off than a Genius without a Plan'. Ask any successful Entrepreneur or start-up business owner and they could not agree more. But understandably, Strategy Planning may not be for everyone as it tends to showcase a business professionals' "Depth of Competence" (or on the flip-side perhaps a lack there of...).

Sharp business professionals learn very quickly that "The Most Organized, Most Focused, Most Prepared... will consistently prevail." – Sun Tzu (The Art of War – 500 BC)

The 5 Most Common Challenges Facing Business Professionals Today:

- #1. Great Goals and Objectives but No Written Plan - An agile 'Working' Strategic Execution Plan with specific details of just how you intend to accomplish your targeted strategic goals, objectives, and priorities can be a Game-Changer!
- #2. Lack of a highly synergistic professional support 'Core-Team' – Your team of 4-5 highly organized, motivated and engaged individuals that are 100% reliable at rapid follow-through, again...a Game-Changer!
- #3. Inadequate pre-meeting 'Preliminary Due Diligence' process – enabling you to very quickly become very organized and prepared in every meeting, discussion or opportunity.
- #4. Ineffective Accountability and Follow-Through - weekly meetings that focuses on the Top Priorities moving you rapidly forward rather than a rehash past activity.
- #5. Inadequate monthly Performance-On-Goal 'Recalibration' – because a fluid, agile Plan is critical for adapting to today's rapidly changing business arena.

Free downloadable Excel Templates are available through our www.StrategicPlanning.com or Rene@PeerAdvisoryForum.com.



Rene Rojano

Specialist in Business Development and Strategic Execution Systems

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Disruptive Strategy In Action: In 1998, Kodak had 170,000 employees and sold 85% of all photo paper worldwide. Within just a few years, their business model disappeared and they went bankrupt. What happened to Kodak will happen in a lot of industries in the next 10 years - and most people won't see it coming. Did you think in 1998 that 3 years later you would never take pictures on paper film again? Yet digital cameras were invented in 1975. The first ones only ha ...see more

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The Strategic Performance Institute

May 2017 – Present · 2 yrs 5 mos

- Support CEO and entrepreneurial think tank strategic discussions
- Performing Project Design & Management, Real-Time Data Capture, Online Strategic Research & Analysis and Logistics Coordination.
- Provide technical and operational support for monthly Peer Advisory Forum strategy meetings.
- Facilitate break-out teams consisting of 3-5 individuals to understand, analyze and develop strategic action plans for business development issues such as re-branding and market positioning.



Director, Marketing and Digital Strategy

The Digital Marketing Group

2015 – Present · 4 yrs

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... See more



Founder and Lead Mentor

Campfire Getaways

Mar 2013 – Sep 2017 · 4 yrs 7 mos

United States

Campfire Getaways was created to empower young adults and build leaders through outdoor exploration.

Here at Campfire Getaways we have harnessed outdoor exploration into experiential ed... See more



Founder and President

Iota Beta Lambda- Integrated Business Leaders

Jan 2013 – Jan 2014 · 1 yr 1 mo

Orange Coast College

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File: 03-Internship Program - 01



File: 04-Internship Program - 06



File: 05-Internship Program - 02



File: 06-Internship Program - 03



File: 07-Internship Program - 04



File: 08-Internship Program - 05



File: 09-Internship Program - 06a



File: 10-Internship Program - A



File: 11-Internship Program - 07



File: 12-Internship Program - 08



File: 13-Internship Program - 09



File: 14-Internship Program - 10



File: 15-Internship Program - 11



File: 16-Internship Program - 12





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