



## *Joint Track Record*

# *Taurus Concepts and Christensen/Roberts Solutions*



## Track Record

Dear Client,

*The people from the joint venture Taurus Concepts, LLC and Christensen/Roberts Solutions are pleased to provide you with information about the depth of our services, the variety of projects we have completed in different industries, the resumes of our key operational team members, a list of representative clients, and third party endorsements we have received for our work..*

*The business cases that follow provide you with examples of our success in helping organizations realize business process improvements and maintain a competitive advantage. Today's world leaves little room for inefficiencies. The economic environment is unforgiving and margins are eroding in the face of relentless pressure and volatile markets. Under these circumstances, organizations are more interested than ever in optimizing their productivity with particular emphasis on implementing improvements quickly, reaping immediate benefits, and creating sustainable improvements over time.*

*We understand you want bottom-line improvement but without endless presentations and reports. Therefore, we aim solely for delivering measurable and sustainable financial results. Our practical, pragmatic approach minimizes organizational distraction and risk, and it maps the shortest route to cost reduction and productivity improvement.*

*Our approach is based on quality and efficiency. It is uniquely structured to take advantage of the knowledge synergies achieved through a combination of lasting behavioral changes and sound business process principles. Our approach is based on three main concepts: emphasis on a bottom-up view; a focus on people; and a strong commitment to deliver. Those concepts are at the core of how we provide our services and guarantee results. Typically, our services will result in a 15 to 25 percent reduction in operational costs, a minimum of 70 percent return on investment ("ROI") within nine months of commencement of the project, and a 250 percent ROI after one year of completion. We guarantee our estimated benefits upon commencement of the project.*

*Please do not hesitate to contact us should you have additional questions or comments. We are happy to answer all your questions and we look forward to work with you.*

Sincerely,

Folkert Wieringa,  
Hal Christensen  
Lou Roberts  
**Managing Partners**

[www.taurus-concepts.com](http://www.taurus-concepts.com)  
[www.crsol.com](http://www.crsol.com)



## Business Cases

### Manufacturing

## Operational Improvements Business Cases

### Business Case 1

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#### **Total Group: Oil Refineries Cost and Performance Project**

*(Executed by Mr. Frederic Faes)*

The Total Group ("Total") is a leading multinational energy company with almost 100,000 employees and operations in more than 130 countries. Together with its subsidiaries and affiliates, Total is the fifth largest publicly-traded integrated international oil and gas company in the world.

#### **PROJECT**

Total needed to improve the cost and performance of their refineries in order to improve its rating in the Solomon industry benchmark, as well as the profitability of their refinery sites. Total insisted that due to social considerations, there should not be any impact on the internal employment situation. We first led the design phase through careful guidance and coaching of the corporate work groups for the various departments in Paris, such as budgeting, operational planning, contracts and organization in order to define the required approach and outputs to obtain the necessary results. Subsequently, we led the implementation in various refinery sites throughout the world.

#### **FINAL RESULTS**

The two year initiative yielded budgetary improvements exceeding \$55 million over a \$570 million cost basis.

#### **CHALLENGES**

We had to deal with various complexities of the entire organization and cultural differences from department to department and from site to site. Moreover, we were requested that our implementation should avoid any changes to the internal employment situation.

#### **REFERENCES**

- Darrell Jacob, Refinery Manager, Total Group, Port Arthur, TX
- Ian Fowler, Head of MMI Corporate Initiatives, Total Group, Paris, France



## Business Cases

### Health Care

#### Business Case 2

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#### **Hospital: Efficiency Improvement Project**

(Executed by Mr. Mike Forrester)

Hospital consisting of two care centers and various other departments which employed 450 full time employees located in the Netherlands.

#### **PROJECT**

We were requested to diagnose the quality of the care provided and the productivity and costs associated with the various departments of a hospital, and subsequently to design and execute a plan to improve overall quality, and the efficiency by reducing lost time and high labor costs.

#### **FINAL RESULTS**

We realized a 397% ROI and an annualized cost reduction of approximately \$4.7 million thanks to implementing a system stating expectations and targets per patient, and by reviewing and enhancing their business-processes. It was crucial to combine this with an organizational-wide behavioral change from pure quality thinking to include cost-awareness. This change process was supported by installing simplified administration processes. The number of operational (e.g., labor) costs was reduced by 14% whereas the time for care per the 'attention hours' for clients was increased.

#### **CHALLENGES**

We were challenged in the various care areas due to high levels of lost time caused by both overstaffing and a lack of flexible staffing at the same time. The processes were insufficiently defined and the management lacked follow-up on employee performance. The expectations of various supervisors were unclear and led to multiple inefficiencies in the business processes. Moreover, interference by certain physicians, organized as external parties to the hospital, caused additional inefficient business processes.

We were further challenged in the administrative department, where high levels of lost time, along with over-capacity, were observed. It appeared that work was doubled, as forms were reworked and various corrections made, due to ineffective business processes and co-operations between all departments.

We were finally challenged in the catering department where we observed un-proportionally high volumes of administrative work. Management lacked the necessary information to adequately steer this department, as it severely lacked appropriate capacity planning related to the daily needs. This eventually led to high levels of inefficiency and a structural over-capacity.



## Business Cases

### Logistics

#### Business Case 3

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#### **Norwegian Cruise Line**

(Executed by Mohan Menon)

One of the world's largest cruise lines serving the travel and hospitality industry

#### **PROJECT**

We were requested to diagnose the quality and the effectiveness of the maintenance department, and the productivity and costs associated with the various products and services, and subsequently to design and execute a plan to improve overall quality, and the efficiency by reducing lost time and high labor costs.

#### **FINAL RESULT**

A turnkey enterprise resource plan, addressing the needs of all internal and external customers, was implemented over 18 months. The system took three years to develop after considering all customer touch points, reducing duplication, improving efficiencies, and reducing costs while improving throughput. Overall we achieved margins of 25%, with specific business units exceeding targets.

There was a major re-organization in place as we matched new skills to business practices. This was done in phases to ensure the least amount of disruption.

#### **CHALLENGES**

The company had to be transformed from a change resistant environment to an adaptable and flexible structure. This took several iterations of change requests, business reengineering, cultural shifts, and a willingness to cooperate with management, staff and vendors. This was a time consuming effort but with lasting effects.

Business as usual was no longer the mantra. Innovation and change became the order of the day.

#### **REFERENCES**

- Colin Veitch, former President and CEO, Norwegian Cruise Lines, Miami, Florida, USA
- Yuri Polissky, COO, Versonix Corporation, San Jose, California, USA



## Business Cases

### Financial Industry

#### Business Case 4

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##### MasterCard Worldwide

(Executed by Mohan Menon)

World's second largest credit card company serving the financial services industry

##### PROJECT

We were requested to diagnose on a strategic level enterprise opportunities to enhance business performance by increasing efficiency, productivity and reducing costs, while improving guest experience.

##### FINAL RESULT

By taking on a very intensive TEAM (Together Everyone At MasterCard) approach, MasterCard realized savings of \$100 million within the first two years, while increasing sales by 50%. This entailed engaging all employees at MasterCard to be on the same platform as the company went through a major catharsis, going through an IPO while streamlining all business processes end-to-end. A major undertaking, as staff were organized into PITs (process improvement teams). It has continued to bring down the operating leverage year-on-year.

Our focus was how customers (issuers and acquirers) were serviced on the back end from account setup. The entire operations area was reviewed and opportunities identified and deployed. Because we had to engage local processing points by way of regional offices, feedback loops provided an on-going pulse at customer touch points, as issues were steadily improved globally,. The process never stopped and is still part of the DNA of the company, and the IPO was a tremendous success as the stock price increased more than 5 times within 5 years.

##### CHALLENGES

Though a global entity, it was owned by member banks, which had a very different business model compared to the present public company. This required a major shift in attitude and market perceptions requiring every aspect of the company being looked at. Business units which did not exist before came into existence, such internal consulting groups, customer-centric management programs, with high emphasis on the bottom line.

The company met its challenges well and was very adaptive to changes since there was impetus from top management, as we were charting untested waters in going public from a membership status. This was a first in the market and very well received as history was made.

##### REFERENCES

- Robert Selander, President and CEO, MasterCard Worldwide, Purchase, New York, USA
- Chris Thom, Former Chief Risk Officer, MasterCard Worldwide, Purchase, New York, USA



# Process Infrastructural Re-design Business Cases

## Health Care

### Business Case 5

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Major Hospital  
Patient Accounts Department  
Executed by: Hal Christensen

#### **PROJECT**

The Patient Accounts representatives must answer queries from patients, review and analyze the patient's accounts, explain their findings to the patient, and take whatever follow-up actions are appropriate to resolve the inquiry. The goals of the project were to reduce the amount of time the Specialists spent trying to determine how to handle a patient's specific question; increase the consistency in the answers they provide to a patient; increase their confidence level, by providing immediate and detailed information on how to correctly respond to each type of inquiry; reduce the amount of time it takes for new reps to learn the job and be prepared to handle live patient calls; disseminate information to all staff members as soon as it is known; and assist representatives from other Patient Account units who provide back-up when the call volume is high or in times of short staffing.

#### **FINAL RESULTS**

We worked with internal staff to create a just-in-time knowledge base, ASK PA, which was designed to instantly provide the knowledge and resources the reps would need based on the query they were trying to resolve and where they were in the appropriate workflow. The results of the ASK PA initiative, gathered through interviews with members of the Patient Accounts Department, include the followings:

Reps reported that they no longer have to ask the Supervisor for answers about the workflows, which are now in ASK PA, and the Supervisor reported receiving fewer questions related to those workflows. He also has been able to save his time by referring the reps back to ASK PA for the answer rather than answering the question himself. Reps reported that they spent less time on calls related to those workflows, because they no longer had to leave their desks to seek answers to their questions. Fewer patients had to be on placed on hold and the reps relied far less on call backs at a later time; Reps reported that they spent less time searching for the relevant resources, which are now available from within ASK PA. And managers reported fewer escalated calls related to those workflows.

#### **CHALLENGES**

Creating the deliverables required a well-designed multi-faceted approach. The goal was to not only create the performance support solution but to use the development process to simultaneously address underlying problems and issues.

- All of the current reps were engaged in the process of refining and codifying the best procedures for the five workflows.
- By participating in the development of ASK PA's content, the reps had the chance to discuss all approaches and the reasoning behind them. This produced support for the final workflow process among all staff members.



- Once agreed upon, the approved flows were entered into the ASK PA platform. At that point, ASK PA became the single source for the correct way to handle call flows.
- Current reps use ASK PA for finding or validating answers; new reps use ASK PA in training and preparation for manning the phones and to walk them through procedures that they have not yet internalized.
- The content in ASK PA is updated daily, and an e-mail feedback and inquiry feature is available to send suggestions or questions to the ASK administrator. Based on the feedback, workflows may be revised or resources added.





## Business Cases

### Health Care

#### Business Case 6

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Major Hospital  
Compliance Department  
Executed by: Lou Roberts

#### PROJECT

The Physician Coding Audit and Feedback System was developed for a renowned cancer diagnosis, treatment and research institution. As part of their clinical duties, physicians must choose billing codes for the Evaluation & Management services provided in their outpatient clinics (the typical patient visit to a doctor). Inaccurate code selection and submission can expose the institution and physician to government investigation, negative publicity, financial penalties, and distraction from patient care.

There were numerous constraints that inhibited desired performance, including:

- The complicated nature of the Medicare rules presented an inherent difficulty for the physicians to incorporate into their clinical routines,
- Medicare Rules are not clinically intuitive, are not medically driven and do not aid in patient care, leading to resistance by the physician's population to learn the coding rules,
- Medicare Rules, in general, were created for non-medical personal and involve a 'counting' system for key components and artificial pseudo-estimates of the complexity of the visit which is considered insulting/non-medical to physicians,
- Physicians have extreme time constraints,
- Some physicians do not believe coding is their responsibility and lack basic understanding of the consequences of inaccurate coding.

The original request was to improve code selection accuracy through training or through the hiring of in-house insurance coding specialists. The project team asked for, and was granted, the opportunity to conduct its own independent analysis. They retained the services of a physician consultant who acted as the Subject Matter Expert and physician-advocate during the analysis and solution design.

#### CHALLENGES

Within six months, the project team presented its results. The analysis determined that:

- Most coding errors fall into one of 13 root causes (error groups) and the number of possible errors was finite.
- Most physicians tended to make the same coding errors repeatedly.
- Most coding errors can be corrected by a simple knowledge-based solution, eliminating the need for physicians to learn 90% of the Regulations that would not apply to their specific errors.
- The Medicare rules are confusing and often interpreted differently leading to inconsistent coding decisions.
- Physicians, in general, wanted direct, personalized code-selection feedback.
- With proper support, Physicians could make accurate coding decisions without the need to hire in-house insurance specialists.
- Significant resistance should be anticipated in the implementation of any process that required an additional investment of time for physicians.



## RESULTS

The result of the recommendation was the redesign of the physician coding process based in large part on the implementation of a technology support tool called the Physician Coding Audit and Feedback System. The redesigned process avoided the need to invest approximately US \$2 million in additional staff and the need to force the 400 physicians in the hospital through an insurance coding training class. The new process was designed to:

1. Automate the process of auditing a physician's code selection choice, using a set of established criteria for interpreting Medicare rules in a language familiar to the cancer center.
2. Automate the generation of the correct code using the auditor's answers
3. Identify specific coding errors and the root cause(s) of the error(s).
4. Provide specific, corrective feedback for each error through text-based explanations and recommendations for correcting the errors.
5. Provide management utilities for tracking and reporting results to ensure sustainable change.



## Resumes

Please find hereby the resumes of our key operational team members.

- Mr. Frederic Faes
- Mr. Mike Forrester
- Mr. Pascal Luyten
- Mr. Mohan Menon
- Mr. Steven Drewes
- Mr. Hal Christensen
- Mr. Louis Roberts

### Frederic Faes

Mr. Frederic Faes', a multilingual international management consulting executive, is a Partner at Taurus Concepts where he is responsible for analysis and solutions design. Mr. Faes is specialized in mergers and acquisitions ("M&A"), turnaround/restructuring, industrial excellence, sales performance, and supply chain and quality performance system solutions. Throughout his career, Mr. Faes has led over 130 top/bottom-line growth and/or turnaround initiatives with estimated improvement results exceeding \$2.5 billion. Mr. Faes has provided those services to multinational companies in Europe, the Middle East, Africa, North and South America.

### Representative Client Projects

- Advised various blue chip companies for acquisitions, mergers or value-chain improvement projects including, most notably, the award winning merger in 2005 between Faiveley Transport and Sab Wabco which resulted in the tripling of the share value within 18 months.
- Diversified and expanded an industrial first tier parts supplier that was owned by a fund. Initially, this parts supplier had only 2 clients and \$20 million turnover. 12 new clients and \$8 million new business volume was created while a reorganization initiative resulted in a change in corporate strategy to become a components and system supplier in conjunction with a productivity improvement of 30 percent over 2 years.
- Redefined the maintenance strategy and implemented the actions in all the refineries of the Total Group which moved them from the third to the second quartile of the Salomon index in terms of cost and performance, and resulted in savings of \$55 million (8%) of operational expenditures over 2 years without any social impact.

### Employment History

- 2007-'09
- Partner at Columbus Consulting where he led the international expansion and focused on M&A, industrial excellence and turnaround management services. Certain main representative clients served were Total Group and Lafarge among a number of medium-sized companies.

- 2005-'07
- CEO of Dehousse Industries, a medium-sized first tier mechanical components and systems supplier to the automotive, aeronautics, defense and railway industries. Certain main representative clients served were Peugeot; EADS Socata; Nexter; Alcatel; SNCF; Faiveley; and Knorr-Bremse.

2000-'05



- Member of the Board of the Osaci Group where he led M&A transactions, and restructuring and improvement programs. Certain main representative clients were Mannesmann; ICL-Fujitsu; Al-Ahram Beverages (Heineken); HSBC; Babcock Borsig; Salzgitter; Zamek; Villeroy & Boch; Diehl; Faiveley Transport; Leoni; and M-real.

1998-'00

- Managing Director at Juran Institute where he developed client relationships and executed improvement programs in quality consulting in Germany, Switzerland and Austria. Certain main representative clients were Norsk Hydro; Swiss Post; US Filters; European Parliament; Shell; and Swissair.

1994-'97

- Lead Analyst and Account Manager at Celerant Consulting where he developed client relationships, designed and led improvement programs, including the facilitation and execution of the implementation. Certain main representative clients were Shell; Coca-Cola; British Gas; GM; Holcim; Dunlop; KLM; Nobel; Buderus; and Exel.
- Mr. Faes started his career in 1990 as Project Manager at BMS&K Inc., a Burson-Marsteller subsidiary in Alexandria, VA. His main tasks were marketing, lobbying and on-site project management for the development of industrial real-estate developments in China and Poland.

#### Education

- Master of Business Administration from the ESCP-EAP European School of Management in Paris, France; Oxford, England; and Berlin, Germany from 1987 to 1990.
- Undergraduate Degree (Dean's List) in International Management from the Florida International University in Miami, FL from 1985 to 1987.

#### Languages

- English: near native
- German: near native
- Dutch: native
- French: fluent
- Spanish: business conversation
- Portuguese: basic
- Arabic: notions



## **Mike Forrester**

Mr. Mike Forrester is a Partner and Health Care Director at Taurus Concepts. Mr. Forrester is responsible for the execution of all the Health Care projects and internal training. Mr. Forrester is an experienced management consultant specialized in the project management of behavioral change programs. Throughout his career, Mr. Forrester has led projects and managed teams that delivered significant cost savings for a variety of companies in the healthcare, manufacturing, supply chain, retail and financial sectors. Mr. Forrester has a proven ability to work at all levels within an organization, and has been successful in identifying and analyzing opportunities for change resulting in top and bottom line improvements.

### **Representative Client Projects**

- Designed an overall project approach for all Nitor's clients, a boutique consultancy specializing in behavioral change programs that provide a financial guarantee on improvements. The new approach resulted in a higher than expected return on investment of 8 to 1.
- Designed, installed and ran a performance appraisal system for all consultants of Star Consulting Group, an international consultancy focusing on productivity improvement programs for clients throughout northern Europe. This resulted in higher retention levels and an increased service level.
- Successfully designed a healthcare behavioral change approach for a reputable hospital in the Netherlands using certain Lean tools combined with support training and a coaching program for both medical and non-medical managers.
- Implemented certain productivity improvement strategies resulting in a 65% productivity improvement in conjunction with a reduction in manufacturing sites from five to four by re-engineering the supply chain and production areas for a major garden products company.
- Provided a medium sized law firm with commercial sales training that enabled a cross selling strategy within the firm which resulted in an increase in revenues of approximately \$4.5 million.

### **Employment History**

- 2008 – '09

  - Project Manager at Nitor Implementation, Ltd in Dublin, Ireland, where Mr. Forrester had overall operational responsibility for all client projects within the UK, including initial analysis, design and implementation of projects resulting in top and bottom line improvements, and also led project teams and the client's task teams, and assured the results through aftercare support.
- 2004 – '08

  - Internal Training Manager and Project Manager at Star Consulting Group where Mr. Forrester led the design and development of all internal training programs, client training and project management. Mr. Forrester also coached client's senior management.
- 2003 – '04

  - Founder, Owner and Consultant at BPSE, Ltd, a change management consultancy for the UK market which used proven management technology to deliver sales and productivity improvements for various clients.



1989 - '03

- Consultant, Trainer, and Project Director at IMPAC. Mr. Forrester led implementations of process improvements, management control and reporting systems and behavioral change in large multinational companies worldwide.

#### **Professional Qualifications and Training**

- Dale Carnegie: High Impact Presentations – March 2007
- ISO Lead Assessor – March 1998
- IMPAC Project Director class 1994

#### **Education**

- Bachelor (Honors) in Anthropology and Geography from Oxford Brookes University, Oxford, UK from 1985 to 1988
- Cheney Grammar, Oxford, UK from 1970 to 1977



## **Pascal Luyten**

Mr. Pascal Luyten is a Principal at Taurus-Concepts and responsible for operations, assessments and training with a focus on delivering sustainable improvements and significant cost savings in manufacturing, services and the health care sectors. Mr. Luyten has more than 6 years experience and has been responsible for more than \$20 million in cost savings for various multinational and national companies in the Netherlands, such as Koninklijke PTT Nederland N.V. ("KPN"), a leading international telecommunications service provider, Leaseplan, Yacht, Heiploeg and CARE where Mr. Luyten provided sustainable results per a focus on process improvement, management control, report systems, leadership, and behavioral change. Additionally, Mr. Luyten has provided services to companies throughout Europe in the areas of restructuring, operational excellence, Lean Six Sigma, supply chain management and quality performance.

### **Representative Client Project**

- Redefined and implemented the operational strategy of a sports apparel retail organization with \$13 million in annual revenues resulting in a \$3 million increase in revenues and 30% productivity increase within one year of the inception of the project.

### **Employment History**

- 2007- '10  
• Founder and Managing Director at LIM & Consulting where Mr. Luyten led the execution of cost saving programs by implementing Operational Excellence, Lean Six Sigma and Lean Production.
- 2004-'08  
• Project Director at Principal Consulting where Mr. Luyten led implementations of process improvements, management control and reporting systems and behavioral change in large multinational companies
- 2002-'04  
• Manager of Operations at Hypo Plaza B.V., a medium sized retailer with 12 stores and 150 employees, located throughout Europe. Mr. Luyten led the daily operations and corporate management.
- 2001- '02  
• Operations Manager at Decathlon where Mr. Luyten led the daily operations in the Netherlands. Decathlon is a major French retailer with a global presence.

### **Education**

- Lean Six Sigma Black Belt (certified) from the University of Amsterdam, Amsterdam, the Netherlands
- Masters in Business from the University of Nijmegen, Nijmegen, the Netherlands from 1996 to 2001.

### **Languages**

- English: fluent
- Dutch: native
- German: business conversations
- French: business conversations



## **Mohan Menon**

Mohan Menon worked is a Senior Project Manager at Taurus-Concepts and is responsible for operations. Mr. Menon has more than 20 years experience and has been responsible for more than \$175 million in savings. Mr. Menon successfully worked with executive management to achieve operational excellence end-to-end, by increasing the top end, while containing costs, improving margins and raising the overall customer experience at every touch point. Exceptionally strong in defining opportunities, implementing tactical and strategic building blocks, while harmonizing organizational implications in change-receptive environments. Adept at gaining buy-in from executive management and building relationships throughout the organization to implement roadmaps to achieve stretch goals, based on strategic mission and driven by business metrics and dashboards. Cross-functional experience to implement team-driven solutions based on root-cause analyses. Serve as a coach to mentor and lead by example to deploy business transformation and cultural shifts by harmoniously integrating people, processes and systems at all levels of the organization, especially high transaction environments providing internal & external shared services.

### **Representative Client Project**

- For Norwegian Cruise Line managed vendor to ensure timely system development, unit testing and compliance of all modules, especially with GL and accounting interfaces. Implemented rule-based integrated reservation system within 18 months for smooth cutover to drive 20% more transaction volume at 15% reduced costs. Conducted full manning analysis within Hotel Operations to target 10% less staffing within housekeeping, F&B, galley and dining services. Streamlined supply chain management and procurement to reduce costs by \$20MM based on new purchasing outsourced-model resulting in improved consistency, reduced quality variance, efficient tracking and accounting. Worked with PWC external auditors on SOX compliance issues.
- For MasterCard designed key account management metrics, scorecards and reporting tools to track and monitor client services to improve early detection of issues. Designed and implemented all aspects of CRM feedback on operations, security, risk and marketing. Worked with departments to raise client satisfaction 15% by developing and implementing integrated improvements in procedures and technology to enhance brand experience. Identified and implemented cost savings of \$140 MM (10% of expense base) over two years by streamlining, elimination and improving processes.
- For CIT Group Improved profitability 20% by implementing effective operational controls, management reporting systems and flexible database for cross-selling and marketing. Reduced product and market overlap 25% with sales staff integration. Restructured operating companies to better utilize shared resources and IT capacity, since Corporate Systems and Technology operated on a shared-service model for seven operating companies on a fully charged out basis.

### **Employment History**

- 2006- '10
  - Consultant where Mr. Menon consulted and advised companies on investment opportunities, conduct due-diligence for capital infusion with upside turnaround potential. Streamline outsourcing verticals through enhancements in systems, infrastructure, business process, and account management to increase deal flow.
- 2002-'06
  - Vice President at Norwegian Cruise Line where Mr. Menon reported to CEO and executive management on strategic enterprise opportunities to enhance business performance by





increasing efficiency, productivity and reducing costs, while improving guest experience. Assessed levers & drivers shipside, shoreside and cross-over areas.

1995-'02

- Vice President for MasterCard International where Mr. Menon led departments to manage and build key customer relationships for accounts in global markets. Improved brand position and acceptance. Analyzed multi-channel delivery focusing on fact-based marketing decisions driven by CRM for transacting in a secure environment. Integrated enhancements for new products & services to meet client expectations and achieve 15% annual growth rate in customer satisfaction-management.

1989- '95

- Vice President at CIT Group Corporate Planning & Service Quality where Mr. Menon Improved profitability 20% by implementing effective operational controls, management reporting systems and flexible database for cross-selling and marketing. Reduced product and market overlap 25% with sales staff integration

1987- 1989

- Assistant Vice President at Bankers Trust Company where Mr. Menon managed internal consultants driving process improvements, organizational changes and platform enhancements. Analyzed existing businesses and improved Bank's profitability by 20% through divestitures. Implemented tighter internal controls and reporting systems for trading operations, cash and global fiduciary management. Reduced operating expenses by 15%.

#### Education

- Business intelligence, corporate advisement, customer loyalty integration, process improvement, knowledge transfer and change management.
- Masters of Business Administration in Finance from the University of Pennsylvania



## Steven Drewes

Mr. Drewes is a Senior Project Manager. Mr. Drewes is a results-driven leader with over 18 years of international and domestic experience in manufacturing of metal components for aircraft, industrial gas turbine engines, small arms, hydraulics, medical and electronics industries. This experience includes progressively challenging leadership positions within manufacturing, engineering, project management, cost-containment and staffing. Particular emphasis on: Plant Start-ups/Relocations, Turnarounds, LEAN Manufacturing and Continuous Improvement results. Mr. Drewes is recognized as a turnaround improvement professional known for delivering strong revenues, profit gains, and multi-million dollar cost reduction projects.

### Representative Client Projects

- For Private Aerospace Group Achieved UTC Supplier Gold representing 60% of the sales for the last 12 months was accomplished with the reduction of costs and defects, and the increase of profitability, using the metrics for Safety, Quality, Delivery, Working Capital, and Environmental philosophy. Freed up over 10% of the direct and indirect employees which have been redeployed on LEAN initiatives or the newly created New Product Development business unit. Freed up 25K+ft<sup>2</sup> factory floor space allowing to merge a 75-employee facility into an existing location. (reducing merged facilities footage from 50K+ft<sup>2</sup> to under 25Kft<sup>2</sup>, with analogous productivity gains) Mr. Drewes personally facilitated and completed dozens of Kaizen events; 170 employees have been thru LEAN intro training.
- For Standex International Mr. Drewes was responsible *for consolidated P&L for all 7 leading Electronics companies located in 5 countries - Mexico, Canada, China, England, and USA. Sales totaled \$60M with a combination of new product development 20% low volume/high mix Aerospace and 80% high volume/low mix in the automotive, commercial and retail markets*
- For Microbest Inc Mr. Drewes was responsible for taking a \$4.8M company which was 3 months from bankruptcy and losing customers and market share to sales of \$10.2M in 12 months and profitability for 7 consecutive months following our changes. This was achieved through motivating and coordinating all aspects of a 24/7 precision metal manufacturer in CT (120+ Employees that now believe they can!)

### Employment History

- 2008 – '10
  - Director of Operations where Mr. Drewes Responsible for initiating a corporate wide LEAN transformation across 4 sites, 480 employees \$100M in sales. Reporting to the Owners, duties include full P&L responsibility for corporate and one other site as well as new product development. Created business units and process cells by providing multi-functional teams and local leadership with the abilities to develop, execute operational excellence, growth, and other key strategic initiatives, through the use of lean philosophies & processes.
- 2006 – '08
  - Vice President of Global where Mr. Drewes Initiated LEAN culture across via Kaizen activity in all sites. Resulting in the ability to consolidate two of the facilities into the other existing locations.

2004 – '06



- Founder of Drewes Dynamics LLC where his focus was on guiding leaders wishing to take their companies through the LEAN transformation, the key/process to unlocking the true potential of your people's ability to satisfy your customer's needs. We do this through a passionate and relentless pursuit of the elimination of waste on the factory floor and in the office through LEAN principles and techniques, resulting in outstanding improvements in quality, delivery, cost and growth in your business. More importantly the process and the people delivering it will unleash the passion in the people driving your business forward.

2002 - '05

- Consultant, Trainer, and Project Director at IMPAC. Mr. Forrester led implementations of process improvements, management control and reporting systems and behavioral change in large multinational companies worldwide.

#### Professional Qualifications and Training

- Dale Carnegie: High Impact Presentations – March 2007
- ISO Lead Assessor – March 1998
- IMPAC Project Director class 1994

#### Education

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- Lean Six Sigma Black Belt (certified)
- BS, CIVIL ENGINEERING, Central Connecticut State U, New Britain, Connecticut
- MS, IND. TECHNOLOGY & OPERATIONS MGMT, CCSU, New Britain, Connecticut



**Louis E. Roberts, Jr.**

Lou Roberts has been working in the field of organizational and employee performance improvement for over 25 years. Over that time, he has helped his Fortune 50 clients execute on their business objectives through their business process improvement and corporate learning initiatives. Mr. Roberts has a wide range of skills to serve clients including business process redesign, change management, instructional design, and knowledge management. Mr. Roberts is known as a long-term high-relationship consultant.

**Representative Client Projects**

- For an internationally recognized cancer center, Mr. Roberts reformed the process by which hospital physicians complied with Medicare regulations to obtain insurance reimbursement for doctor visits. The process redesign included the design and implementation of an automated system with built-in compliance control mechanisms. The process redesign avoided a planned staff hiring expense of US \$2 million for professional "insurance coders" and substantially reduced the legal risk and negative publicity associated with incorrect insurance coding resulting in overpayment claims
- Mr. Roberts served as a performance improvement consultant with AT&T, a relationship that has lasted over 17 years throughout the company's various incarnations as Lucent Technologies and then Avaya, Inc. Originally responsible for transforming the sales staff to adapt to the newly unregulated and market-driven telecom industry, Mr. Roberts' skills in more strategic capacities were quickly recognized. Over the decade and a half relationship – which continues today – Mr. Roberts was given responsibility for the design of the global sales training curriculum as part of a highly touted example of internal/external partnership. Mr. Roberts was most known for the creation and implementation of Avaya's most successful executive sales training program to date: The Executive and Solutions Selling – Business Acumen (ESSba) program.

**Employment History**

- 1994 to present
  - Founding Partner at Christensen/Roberts Solutions, a performance improvement consulting company with nationally recognized leadership in reducing performance gaps to ensure that work will be done with the greatest speed, competence, and accuracy and that maximum performance will be sustained over time.
- 1986 - 1994
  - President of Creative Communications and Training, a performance improvement and training design and development consulting company.
- 1984 –1986
  - Technical Director of Microcomputer Technologies at EPIE/Consumers Union. In this role, Mr. Roberts made monthly television appearances on the PBS series "Educational Computing" to discuss on applications of microcomputer technology for employee learning and development.

**Professional Qualifications and Training**

- Certified in Business Process Redesign from the Hammer Institute.
- Certified in Change Management from the Change Management Learning Center.
- Received numerous awards for the design and implementation of innovative and successful client engagements.



**Education**

- BA, Bowdoin College (Romance Languages and Economics)
- MA, Columbia University Teachers College (Education, Computers and Technology)
- Sorbonne, Paris (Cours de Civilisation)

**Languages**

- English: native
- Spanish: fluent
- French: read, write and business conversation



## Hal Christensen

Hal Christensen has 25 years of corporate consulting experience in enabling organizations to improve employee performance and processes. Clients have included many Fortune 500 companies, including Merrill Lynch, Memorial Sloan-Kettering, UBS-PaineWebber, Prudential, Thomson, State Bank, ADP, AT&T, Lucent Technologies, Avaya, Citibank, NASDAQ, Exxon, American Express, PricewaterhouseCoopers, Realogy, and the New York Stock Exchange. He is recognized for the work he has done to demonstrate the power and efficiency of embedding just-in-time targeted knowledge into workflows for maximum performance that can be sustained over time.

His professional contributions include over two dozen presentations at national professional conferences, several articles, recognized thought leadership in the Performance Support field, and numerous professional awards.

### Representative Client Projects

- For several large organizations, including IBM, Toy R Us, and Kodak, Mr. Christensen implemented a knowledge base that delivered just-in-time answers to internal telephone representatives. His solution enabled companies to reduce training time from 30 days to four days, while delivering the information callers requested faster, and with greater accuracy.
- For a major hospital, Mr. Christensen instituted significant cost savings and gains in performance for phone representatives, eliminating inefficient call-time delays and increasing accuracy by allowing them to instantly access all the resources and information they needed to answer callers' queries.

### Employment History

1994 –2010

- Founding Partner at Christensen/Roberts Solutions, a performance improvement consulting company with nationally recognized leadership in reducing performance gaps to ensure that work will be done with the greatest speed, competence, and accuracy

1985 – 1994

- Director of Performance Support Solutions for Sterling Resources, a consulting company specializing in learning and development solutions. Mr. Christensen designed and delivered successful solutions for improving the performance of employees at American Express, NASDAQ, Bellcore, Caesars Atlantic City, NY Port Authority, Dreyfus, Exxon and numerous other companies. He pioneered the introduction of computer technology for the purpose of training and performance improvement in the New York City area.

1981 -1985

- Training Officer at Morgan Guarantee Trust. At Morgan, Mr. Christensen was in charge of product training for new Account Managers. He introduced numerous innovations for reducing costly training time while improving and sustaining the Account Managers' performance and effectiveness.

### Professional Qualifications and Training

- Popular speaker at major professional conferences since 1984
- Recognized thought leader in the Electronic Performance Support movement



- Has received numerous awards for the design and implementation of innovative and successful client engagements.

**Education**

- BA, Syracuse University
- MA, University of Missouri



## Representative Clients

- APM Terminals
- American Express
- Avaya
- Auping
- BAM
- CARE United
- Citibank
- Corus
- Dalminne, Mannesmann, Vallourec
- DHL
- Doncaster de Mexico
- Dreyfus
- Erbi
- Euretco
- Hago
- Heiploeg B.V.
- Holcim
- ING
- Lucent Technologies
- MasterCard International
- Merrill Lynch
- Memorial Sloan-Kettering
- Norwegian Cruise line
- Private Aerospace Group
- Prudential Insurance
- Raet
- Thomson International
- Total Group

## Third Party Endorsements

What our clients had to say...

***"The management of Taurus Concepts has successfully contributed to the completion of several projects. ... The projects resulted in ROI's between 200 and 300%. ... The main benefits of working with the management of Taurus Concepts are the goals clearness, measurable results and the ability to put in place a dynamic management and realize communication improvements ..."***

Mr. Bart Van Essen  
Managing Director, ProExc B.V  
Laren, the Netherlands

***"We at Boeing were intrigued by your company activities and the fact that you are venturing out to share your expertise to streamline business processes using Lean/Six Sigma and Theory of Constraints. ... The initial assessment is a good trigger to share with the various companies that we may be dealing with in the future to see how to modify and improve their productivity."***

Mrs. Ligia McLean  
Manager, International Business Development, The Boeing Company  
Phoenix, AZ

References and endorsement letters are available upon request.

