



TRUE NORTH
Map Your Journey to Strategic Partnership

WIN BETTER, RETAIN BETTER BUSINESS.



TRUE NORTH
Map Your Journey to Strategic Partnership

FINDING TRUE NORTH[®]

**WHAT'S YOUR VISION,
MISSION & PURPOSE?**

**HOW CONSISTENT IS
YOUR WIN RATE?**

**WHAT'S YOUR
RETENTION RATE?**

**WHO ARE YOUR IDEAL
CLIENTS? AND NOT?**



**STRATEGIC PARTNERSHIP
SUCCESS IS BOTH AN ART
AND A SCIENCE.**

**TRUE NORTH® IS DESIGNED
TO HELP YOU WIN BETTER,
RETAIN BETTER BUSINESS.**



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www.4xiconsulting.com

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Growth and retention performance are key success factors for any business. Win more, retain more, focus your resources on the clients that impact your business the most. TRUE NORTH® Strategic Partnerships & Growth Academy is designed to help you and your team win better, retain better business.

We have developed these learning sessions in such a way that they are not just a training or teaching administrative activity. Rather to develop new thinking and change behaviors that translate into real business impact.

TRUE NORTH® is your roadmap to building the right kinds of business, with your ideal clients and creating the best outcomes for both them, and for your organization. The program lays down the foundational learnings for your team - from building mutual trust, to deep self-reflection of both strengths and opportunities, to practical steps to retaining better, winning better business.

From essential foundational workshops and collaboration to strategic partnerships and growth training, TRUE NORTH® is an all-encompassing program, including:

- **NORTH STAR** – Vision, Mission & Purpose
- **FUTURE FOCUS** – Where do you want to be and when?
- **MarketMatch®** - Ideal Client Characterization, Profile, and Target List
- **BUSINESS PLAN** – Your roadmap to growth
- **TRUE NORTH® Academy** – Sales and retention team training

TRUE NORTH® is a practical set of principles, disciplines, and tools designed not to sit in a draw gathering dust but to be embedded into the business and become an approach and behaviors used every day - to drive better business performance.

This is about creating relationships that fuel growth and success both for your organization and the customers you serve.

The path to strategic partnerships is a journey – but one you don't have to take alone.

WIN BETTER, RETAIN BETTER BUSINESS:

- 1. NORTH STAR**
- 2. FUTURE FOCUS**
- 3. MARKETMATCH[©]**
- 4. BUSINESS PLAN**
- 5. TRUE NORTH[©] ACADEMY**

DISCOVERY MODULES



NORTH STAR - STRATEGIC CHARTER

Identifying or revisiting the Vision, Mission, and Purpose of any organization is imperative. This module takes you and your key stakeholders through a process to memorialize your NORTH STAR.

- Vision, Mission & Purpose Framework
- Stakeholder pre-share
- Stakeholder Live Workshop
- Memorialize your NORTH STAR

Once complete, it's important to make this very visible and become fundamental in all your communications. You may consider how you display this in your managers offices, incorporate in your daily team meetings and training and position this important NORTH STAR in such a way it can drive transformative culture and performance change.

- 3 X 1-hour virtual sessions with pre-prep and follow up.
- **Deliverable:** NORTH STAR Strategic Charter.

INVESTMENT: \$5,000

NOTE* 4xi can also help with graphic design options for cascade.



FUTURE FOCUS

How often have you heard the statement, “we want to double in size over the next 5-years”? Probably quite a lot, but when you really dig into that and understand what it takes to get there you may well find a misalignment – FUTURE FOCUS is designed to help you through that process.

Working with your key stakeholders we will help you brainstorm and identify where you want to be 5-years from now. From that we'll pose the questions of what are the things that need to be done immediately, in the next 12 to 24 months, 2-years in order to hit that FUTURE FOCUS.

Although this may seem elementary, often it is not as through the process different perspectives are revealed as are challenges or obstacles to overcome.

- 3 X 1-hour virtual sessions with pre-prep and follow up.
- **Deliverable:** FUTURE FOCUS Roadmap Report.

INVESTMENT: \$5,000

DISCOVERY MODULES



MARKETMATCH®

Market Match© is an exercise we undertake with your sales, retention, and operations teams. The methodology walks through a deep self-reflection of strengths and weaknesses - where you thrive as a business and where you just survive.

Our facilitators take you through the following steps:

1. Ideal Client Characterization:

- What are the characteristics of your Ideal Client?
- Industry, Geography, Size, Culture, Philosophy.
- Buying Behaviors, Complexity, Value vs. Price.

2. Ideal Client Profile:

- Who are the Ideal Clients likely to be?
- An ABC Company between \$D and \$E revenue in the F region of the United States, having a win-win partnership culture, believe in supporting local suppliers, and their decision-making process is lean.

3. **Ideal Client Target List:** We then work with your team to identify actual Clients that fit that profile.

4. Create “look-a-likes” to grow your Ideal Client Target List.

The MarketMatch© process is focused on the following fundamentals:

- Understanding in what relationships you succeed (or fail)
- Profiling those relationships
- Build a quality (not quantity) list of target opportunities

This will help focus your growth team on prospects with better chances of conversion, AND a greater likelihood of success.

- 4 X 1-hour virtual sessions with pre-prep and follow up.
- **Deliverables:** MarketMatch© Report memorializing findings, HERO Statement, MarketMatch© One Page collateral piece, Ideal Client Target List.

INVESTMENT: \$7,500



BUSINESS PLAN

The 4xi team can help you pull all these elements together into a “pitch ready” business plan with financial and resource plans to turn your growth aspirations into a glidepath to success.

**“IF YOU DON'T HAVE
TIME TO WRITE A
SHORT LETTER, WRITE
A LONG ONE INSTEAD.”**

STAR PAGES



SEE MORE THAN EVER BEFORE

Safety matters now more than ever before — but understanding what is happening in real time is the best way to enable sanitation and safety, while minimizing surprises.

Your clients and visitors want **clean environments** that just work with a minimum of hassles and inconveniences.

At Zan we can simplify the work of keeping your building running smoothly and enable great experiences for those using your offices, meeting spaces and washrooms.

Let's face it, there is nothing more frustrating than out of stocks on paper towels and toilet tissue — not to mention conference rooms that were missed on the last round of cleaning.

Using **technology, sensors, and AI** that works with all your existing systems and equipment, we can ensure that you never have to worry about the safety or convenience of your visitors ever again.

It's just that simple.

TECHNOLOGY THAT DELIVERS REAL TIME VISIBILITY

ZAN COMPUTE

Through our easy-to-use platform, Zan delivers insights and data-driven visibility into your building operations.

SAFETY | EFFICIENCY | VISIBILITY



OCCUPANCY MONITORING

Understanding your building occupancy as well as how visitors utilize the space will help you make better decisions with staffing and scheduling. When you understand customer patterns it allows you to make the best use of your valuable real estate resources. You can also track the cleaning activities and duration of employees across your property to drive efficiency.



SMART RESTROOMS

Your customers will never run out of paper towels or soap again with this integrated technology solution. But more than that, we can help you collect data on building occupancy, weather, flight schedules, or room usage to create cleaning schedules that improve your overall sanitation while reducing your costs and optimizing operations.



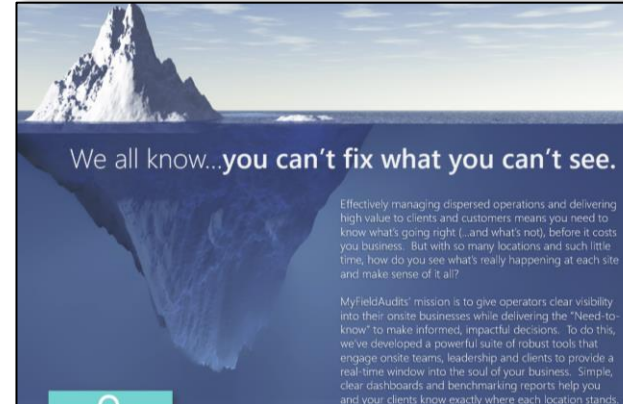
REAL TIME FEEDBACK

Through our mobile app and data collection technology, you can capture feedback from customers in real time, allowing you to fix problems quickly. Your team can also log their work and supervisors can validate and evaluate the work completed. This allows for efficiency and accountability at all steps of the facilities management process.

LET ZAN HELP YOU GET BETTER VISIBILITY TO YOUR BUILDING OPERATIONS AND DELIVER A CLEANER, SAFER, MORE EFFICIENT ENVIRONMENT FOR THE FUTURE

Contact us today to maximize safety and efficiency in your building operations

sales@zancompute.com | www.zancompute.com | +1 (866) 926-2667



We all know...you can't fix what you can't see.

Effectively managing dispersed operations and delivering high value to clients and customers means you need to know what's going right (and what's not), before it costs you business. But with so many locations and such little time, how do you see what's really happening at each site and make sense of it all?

MyFieldAudits' mission is to give operators clear visibility into their onsite businesses while delivering the "Need-to-know" to make informed, impactful decisions. To do this, we've developed a powerful suite of robust tools that engage onsite teams, leadership and clients to provide a real-time window into the soul of your business. Simple, clear dashboards and benchmarking reports help you and your clients know exactly where each location stands.


Whether it's quality checks, regulatory compliance or training and brand standards, MyFieldAudits makes it easy for your entire team to own quality and ensure it's delivered.

MyFieldAudits

A better way to manage...


Powerful Visibility

See what's truly happening onsite — benchmark your locations (and clients) to provide context what performance means.




Remote Oversight

Skip the trip — our remote inspection platform means less time traveling and more time managing what matters.



Innovative Compliance & QA

We custom craft effective technology solutions that engage your team and clients to provide honest results that ensure everyone owns quality.




Contact us to learn how we can transform the way you manage your business today

www.myfieldaudits.com | +1 (424) 241-3435

George@myfieldaudits.com

MyFieldAudits **MyFieldAudits REMOTE** **MyCustomer Voice**



We understand how important food is to campus life.

For nearly two decades Epicurean Group has been supporting universities, colleges, and students in the Bay Area and beyond.

We know how important food is to the overall student experience, we also know what it means to parents to be confident that their kids have access to healthy, nutritious food in a way that is easy to engage with and enhances campus life.

Epicurean is the leading provider of the best fresh, honest, local food and experiences to Higher Education in the marketplace today.


Let's work together to design the best student experience at your campus.

We may be small, but we have a BIG bite!

UNIVERSITIES & COLLEGES

EPICUREAN GROUP
fresh. honest. local.

Epicurean Group: Proud to be the premier provider of food experiences to some of the top private universities.



Epicurean Group: Refreshingly Simple

“Epicurean Group is proudly an independent, boutique culinary company with our foundations of great food, great people, and great service.

Our clients love our straightforward approach from the experiences we create, to our unwavering commitment to financial transparency, and how our responsiveness allows us to meet their individual needs.

For nearly two decades we have been customizing programs to meet consumers' preferences and attain the highest levels of satisfaction, whether at work, in education, or in senior living communities.

In partnership, we look forward to helping you transform your culinary journey. Fresh, honest, local food & experiences.”

Get in touch to learn how we can help you.

Fresh, honest, local food & experiences

scott@epicurean-group.com
www.epicurean-group.com

BUSINESS PLAN

Target Revenue Growth

- 2021: \$50M
- Year 1: End 2021: \$60M (+\$10M)
- Year 2: End 2022: \$72M (+\$12M)
- Year 3: End 2023: \$86M (+\$14M)
- Year 4: End 2024: \$103M (+\$17M)



Target Revenue Growth



As a means of testing the reality of the growth plan based on existing or new resources, then what does the target revenue growth look like compared with sales resources - Director Business Development (DBD).

A DBD should be able to deliver at least \$5M in new business each year as a minimum with an On Target Earnings level of \$10M each year, with high performers delivering up to \$25M.

Target Growth (By DBD per year)

- Low: \$5M
- Med: \$7.5M
- High: \$10M

These projections are based on having 3 full time Directors of Business Development.

Year Growth Path (Low/Target/Stretch)

- Low: \$90M (+\$40M)
- Target: \$110M (+\$60M)
- Stretch: \$130M (+\$80M)

Ideal Client Profiles

We have gone through the process of creating Ideal Client Characterization, Ideal Client Profiles, and Ideal Target Lists.

This is where we will play and are more likely to win.



HIGHER EDUCATION

- Revenue: \$1.5 to \$20M
- Geography: California, Pacific Northwest, and Colorado
- Privately owned
- Terms: 5+ years
- Population: 500+
- Long term growth potential



BUSINESS & INDUSTRY

- Revenue: \$1 to \$10M
- Geography: California, Portland, Puget Sound, and Colorado
- Population: 750+
- Company values providing Great place to work
- Terms: 3-7 years
- Onsite Kitchen
- Revenue: \$1 to \$5M+
- Geography: California, Pacific Northwest, and
- Privately owned
- Active, Independent, and Assisted Living

Targeted Growth By Sector

Year 1: \$10M

- B&I: \$5M
- Higher Education: \$3M
- Senior Living: \$2M

Year 2: \$12M

- B&I: \$5M
- Higher Education: \$5M
- Senior Living: \$2M

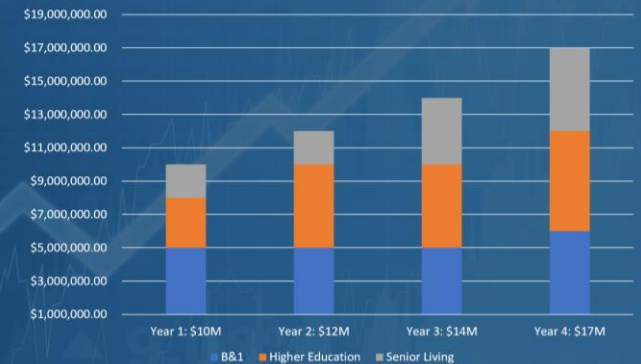
Year 3: \$14M

- B&I: \$5M
- Higher Education: \$5M
- Senior Living: \$4M

Year 4: \$17M

- B&I: \$6M
- Higher Education: \$6M
- Senior Living: \$5M

Targeted Growth by Sector



This graph shows an indicative growth by sector. This will give the business the insights of the mix of business by end of 2024, and therefore help in targeted resources and efforts on different sectors: B&I vs. Higher Education vs. Senior Living and the cashflow and profitability of each - where does the business want to be?



TRUE NORTH
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TRUE NORTH® Strategic Partnerships & Growth Academy

Extensive platforms like TRUE NORTH® have historically being afforded only by large multi-billion \$ organizations with expansive sales teams and often significant training and development budgets – TRUE NORTH® changes that paradigm.

Simon Elliot and Ed Snowden, co-authors of 4xi's Strategic Partnerships & Growth Academy, have decades of experience helping organizations improve their approach to sales and retention. TRUE NORTH® has been created to give access to this level of learning and development for all organizations so you can benefit from their wealth of experience, and a methodology that transforms organizations to win and retain better business.

Sales and retention are fundamental to business success, but so is deep self-reflection around strengths and weaknesses, building a culture based on trust and integrity, and applying a more scientific approach to retention and growth.

TRUE NORTH® Strategic Partnerships & Growth Academy trains your team to become much more strategic in how they approach retention and growth and is wholly appropriate not only for sales and retention but your entire leadership and operating organization, across the Modules:

- I. TRUST
- II. PORTFOLIO
- III. STRATEGIC ACCOUNT PLANS
- IV. COLLABORATIVE SOLUTIONING
- V. ARCHITECTURE OF PARTNERSHIP
- VI. GROWTH LEADERSHIP

Win better, retain better business.



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THE LEARNING MODULES

I. TRUST

Your team learns about the fundamentals of client engagement, strategic partnership, and building trust as the foundation. How to build a culture of client success, deep self-reflection and how to develop partnerships vs. vendorships.

II. PORTFOLIO

The key to the future often lies in the current, and the past. Assessing your current portfolio is key – an honest self-reflection of your actual relationships and performance position is critical in understanding and expanding future partnerships.

III. STRATEGIC ACCOUNT PLANS

Covering complacency, risk, and red flags to heighten your team's sensitivity to risk signals – obvious and less obvious. Participants prepare Account Management Plans to gain clarity around relationships, performance and client perceptions. This living document becomes your North Star for impactful action and results.

IV. COLLABORATIVE SOLUTIONING

How to build a healthy and evenly balanced sales funnel of highly qualified ideal client prospects and how to engage. Participants learn how to build prospecting plans, conduct effective meetings and hold meaningful discovery-oriented conversations while building rapport. Creating a Star Story, business planning, and strategies on whether or not, and how to respond to RFP's.

V. ARCHITECTURE OF PARTNERSHIP

In this module participants make the connection between creating win-win partnership and creating a foundation for its success long into the future. The right contract, the right people, to the right clients with the right statements of work and terms, and then the critically important process of governance, of measurement, and building strategic client partnership charters.

VI. GROWTH LEADERSHIP

Learners gain insights on the fundamentals of being an effective growth leader exploring key attributes: emotional intelligence, growth leader attributes, traits, and profiles. This module lays the groundwork for participants to think deeper about their behaviors and enables greater understanding of the critical skills needed to improve their performance.

AN ENGAGING JOURNEY



IS IT BETTER TO SELL MORE STUFF OR SELL BETTER BUSINESS?



SUCCESS TAKES HARD WORK AND FOCUS

THE SCREENPLAY

- AUDIENCE
- GENRE
- STUDIO
- PRODUCERS
- DIRECTOR
- LEAD ACTORS
- HERO
- CAST
- VILLAIN



FINDING THE RIGHT TARGET



FOCUS ON THE GOAL NOT THE OBSTACLES



SURVIVE OR THRIVE



CHANGING BEHAVIORS

DEVELOPING MOMENTUM IN THE FUNNEL



OFF TO THE RACES

PORTFOLIO RACE CARD

Key Comparison Criteria	Season Placings	Weight	Distance	Stamina	Owner/Stable	Jockey	Rating	ODDS
Tumbleweed	4	3	4	3	3	3	20	5/1
Baby Boomer	4	5	5	4	5	4	27	EVENS
Silver Star	4	4	5	4	4	3	24	7/4
Jack Rabbit	4	4	4	4	4	2	22	2/1

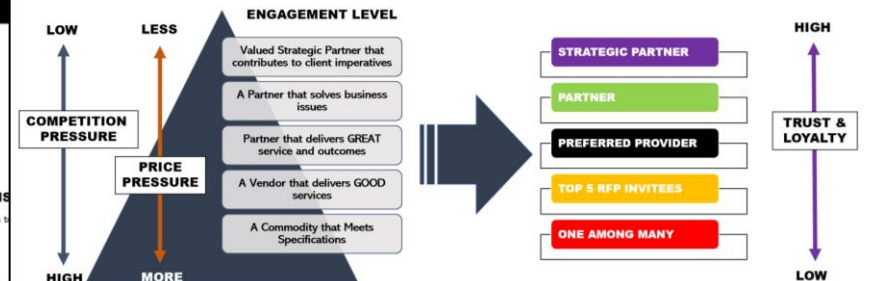
SAM: FOCUS ON THE 3 P's



CONSIDER QUALITY & LOYALTY RISK QUADRANT



LEVELS OF CLIENT ENGAGEMENTS



TRUE NORTH[®] WORKSHOPS

TRUE NORTH[®] Workshops are available in either a face-to-face delivery model, or virtually by video conferencing. The **In-Person Workshops** consists of 2 X ½ Day sessions with a full day sandwiched between – thus fitting in well with the cadence and demands on your busy growth, operations, and retention teams. The **Virtual Workshop Series** is in easily consumable 6 X 3-hour sessions spread over 2 weeks to 3 months.

Whichever option you choose, TRUE NORTH[®] is a learning workshop designed to change behaviors and help you and your team win better, retain better business.



IN-PERSON WORKSHOP **2½ Days | 6 to 20 Participants**

- ☐ Client organizes room, facilities, audio visual, food & beverage, accommodation, and travel (please see guidelines)
- ☐ Lead Strategic Partnerships SME Trainer
- ☐ Plus, Support Facilitator (for more that 10 Participants)
- ☐ Participant workbooks, materials included

INVESTMENT:

- \$2,115 per participant (based on 20 participants)
- \$2,825 per participant (based on 12 participants)
- \$2,825 per participant (based on 6 participants)



VIRTUAL WORKSHOP SERIES **6 ½ Day Sessions | 6 to 20 Participants**

- ☐ Lead Strategic Partnerships SME Trainer
- ☐ Virtual workbooks, materials included
- ☐ Video Conferencing, Virtual Meeting Rooms, Mural

INVESTMENT:

- \$1,500 per participant (based on 20 participants)
- \$1,800 per participant (based on 12 participants)
- \$2,550 per participant (based on 6 participants)

Whether in-person or virtual, we will work with you directly to configure the programs to your individual requirements, circumstances to meet your budget.

TRUE NORTH[®] COACHING

We know from experience that to truly change and embed new behaviors, TRUE NORTH[®] is not a “one and done” and to that end we have included additional team and individual coaching for your team.

The **Virtual Team Coaching** is recommended with a monthly team coaching video workshop each month for at least 6-months after the initial TRUE NORTH[®] workshop.

Where you have new members of your team and they need one specific one-on-one coaching and support, we have included the **Virtual 1-1 Coaching** with 1-hour monthly sessions for 6-months.

**WIN BETTER, RETAIN BETTER
BUSINESS WITH TRUE NORTH[®]**



VIRTUAL TEAM COACHING

6 X 2-Hour Sessions | 6 to 20 Participants

- ☐ Strategic Partnerships Coach
- ☐ Update, refresh, review progress, report back
- ☐ 6-month engagement

INVESTMENT FROM: \$950 per Participant



VIRTUAL 1-1 COACHING

6 X 1-Hour Sessions | Individual Participant

- ☐ Strategic Partnerships Coach
- ☐ One-on-One personalized in the moment coaching
- ☐ Update, refresh, review progress, report back
- ☐ 6-month engagement

INVESTMENT: \$9,500 per Participant



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CONTACT US:



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hello@4xiconsulting.com

APPENDICES

TRUE NORTH[®] CO-AUTHORS



Simon Elliot

Managing Partner
4xi Global Consulting & Solutions

Simon has a world of experience in the food, facilities management, and amenities space.

Originally from the United Kingdom he has led projects around the world including across Europe, Australasia, North and South America, and Asia across a range of business sectors.

As Vice President Strategic Partnerships for Aramark, he was responsible of a \$1 Billion Business & Industry portfolio of clients headquartered in North America.

Simon is a Fellow of the Institute of Directors (London), and the Chair of WORKTECH Academy, North America. He resides in the San Francisco Bay Area.



Ed Snowden

Consultant, Strategic Partnerships
4xi Global Consulting & Solutions

Ed has 40+ years' experience as a growth thought leader managing multi-million-dollar, complex client relationships, leading teams responsible for hundreds of millions of client portfolio, and in his latest role, was responsible for strategic account management and development of a \$500M portfolio across the United States.

Ed is passionate about the principles of Servant Leadership, and as such has mentored many in his career and uses this as the cornerstone of managing client relationships and success.

Ed resides in the suburbs of Philadelphia, is a keen golfer and avid reader.



OUR STRENGTH IS IN THE POWER OF OUR COLLECTIVE

**NEW YORK | SAN FRANCISCO | ORLANDO | SEATTLE |
SILICON VALLEY | LONDON | SANTIAGO | TOKYO**

GLOBAL | CONSULTING | SOLUTIONS

At 4xi we believe in a people first, experience led philosophy. Whether client, employee, or guest – their experience is the fundamental foundation of success.

Amenities, Design & Operations

Customer Experience (CX)

Training & Development

Strategic Partnership & Growth

Innovation & Technology

Solutions & Support

THE POWER OF OUR COLLECTIVE



Simon Elliot
Managing Partner & Co-founder

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As Vice President Strategic Partnerships for Aramark, he was responsible of a \$1 Billion Business & Industry portfolio of clients headquartered in North America.

Simon has worked with several clients through his career reimagining their work experience including Cisco Systems, Nike, Capital One, 3M, NATO HQ, eBay and Goldman Sachs.

Simon is a Fellow of the Institute of Directors (London), and the Chair of WORKTECH Academy, North America. He resides in the San Francisco and Bay Area.



Barbara Boden
Managing Partner & Co-founder

Prior to 4xi, Barbara spent eighteen years building and managing the Global Amenities for JPMorgan Chase & Co. As Head of the department, Barbara managed the client and employee experience in 20 countries for 250K+ employees. She was involved in the design of the facilities, the operating model and employee and vendor management.

Barbara has a unique approach to the strategy, design and execution of human experience – all through the lens of a hospitality mindset – creating spaces and places where people choose to be,

Barbara is an active member of the Business and Industry council for the International Food Manufacturers Association (IFMA), and the Society for Hospitality and Foodservice Management (SHFM). She resides in New York.



Ann McNally
Amenities, Design,
Growth



Tony Johnson
Chief Experience
Officer



Georgina Miranda
Culture, Strategy &
Transformation



Melanie Corey-Ferrini
Design, Strategy &
Innovation



Ed Snowden
Strategic Partnerships
& Growth



Norihiro Kondo
Technology Scout,
US and JPAC



Helene York
Sustainability,
Supply Chain,
Innovation



Katrina Miner
Marketing &
Customer Success

QUESTIONS & NOTES