



## A CPath Engagement Primer

CPath prides itself on delivering Fast, Significant, and Sustainable Results to our clients. Unlike the typical consultant, CPath is not interested in extending our “stay” in order to maximize the billable hours. Our goal, in every engagement, is to deliver value within the minimum amount of time. Our methods are different and aggressive. This document provides an overview of our process, Proactive Opportunity Management (POM), and an idea of what an engagement entails in terms of time and focus from the client.

### Process Overview

Selection – We work with clients with which we believe we can have the greatest impact. We work with clients because CPath has determined the Client has the wherewithal and commitment to change his/her company to maximize revenues and profits. Additionally, the client’s product cannot be a commodity with little to differentiate it from the competition except its price. We determine the level of commitment and the product characteristics before we make a proposal. If you have a CPath proposal in hand, your company can achieve Fast, Significant and Sustainable Results.

### And now we begin...

First step, the client provides CPath with a variety of documents and background information in preparation for a series of meetings with management and staff of the client. The documents include as much data as is practicable to be delivered, such as financial statements, marketing information, product information, organization charts, bios on employees, process descriptions, and competitive information. In short everything you can give us. Additionally, we do independent research about the industry, products, market, competition, environment, etc. Our intention is to complete this research process within a week of starting the engagement.

CPath then begins a series of meetings, initially half-day sessions to probe the CEO and management about what we have read. We challenge and develop the reasoning and reasons behind every aspect of the company. For example, why a particular market is of importance, why a product feature is stressed, how value is presented to the client in prospecting, selling, delivery and post sales activities. Next we meet with department heads, staff, and production workers. We meet with as many employees as possible throughout the organization. In companies of less than 50 employees we will meet at least half. In each conversation we are asking what an individual does, why, what they know about the product, customers, competitors, internal processes, and the marketplace. In this assessment phase we are looking for the true value within the company that can be delivered at a profit to the company’s customers. The initial meetings with management will take less than 3 days of effort. The time to complete discussions with employees is obviously dependent on the number of employees. In addition, CPath will talk with customers, former customers, and prospects that did not become customers.

By this point, 2-3 weeks into the engagement, we have determined strengths, weaknesses, and the changes that need to take place. Dependent on the type of engagement we may have acted already to direct development of new processes, re-evaluate roles, responsibilities, goals, strategies, tactics and metrics. We are communicating with key executives on a daily basis as we focus their efforts on managing to the true value proposition of the organization. If an operating plan exists we will direct its modification. If none exists we will direct creation of an operating plan with clear concise goals. We continue to work directly with employees at every level of the organization. The stronger the management below the CEO is, the more we will manage through them. Often, in companies that are struggling, middle and senior management have opted out of the decision making processes. The CEO carries the weight of all decisions, great and small. The CPath methodology of redefining value will result in middle and senior management taking on the responsibilities and accountabilities of the operation, putting the CEO back into the role of leader, not leader and doer.

By 8 – 10 weeks into the engagement the CEO, the management team and the employees are seeing positive changes. Employees have a clear understanding of what they are to accomplish in their roles. CPath is now onsite at most 1 day per week, but telephone conversations are happening daily. Most likely some staff changes have taken place including terminations. Results are clear enough for CPath to begin to refine the company's plans to achieve results better even faster. Additionally, CPath is aware of the issues in the company that will prevent the current positive results from being sustained over the long term. We begin to focus on resolving those issues. Issues such as a manager that cannot pull his/her weight, operations or process limitations, management capabilities and more. We work with the CEO to define what needs to change in the organization to make the results we are achieving last.

By 16 weeks, CPath expects to be done.

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