

directions

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FALL 2001

A Quarterly Newsletter From The Competitive Business Strategy Group

FIVE AND COUNTING

It was 1996. September 3rd to be exact. It was the day that Suzanne Baldino Jones and Mark W. Heisler left our comfortable executive posts to enter the realm of management consulting.

We met five years earlier—in a police station no less—while being fingerprinted for a security clearance. (Mark's beard always made him look a bit, well, suspicious.) We began as rivals—we didn't really care for each other's act initially. See, first impressions are not always correct. Not long after that we actually discovered that working together challenged us, energized us, made us smarter and more capable.

Those qualities led us to take the plunge into entrepreneurship with no clients, no office space, no equipment to speak of and no clue what was in store. What we did have were supportive spouses, an over abundance of drive and a strong belief in each other.

Well, it's been five years and we have not looked back. We weathered situations that would make most people give up (in fact most do—95% of those who start a business are no longer in business after five years). We faced months with no clients, no money, an occasional client from hell, and a time when we couldn't explain what we did in twenty-five words or less.

Since our business is so intertwined with our personal lives, we helped each other through some rough times: death, sickness, moving and other assorted tribulations that plague most families.

As we look back on those five years there are many to which we are indebted for making our path less treacherous and lonely.

Special thanks to all the great friends and clients we met along the way. To our friends, thank you for listening to all our schemes and ideas. And to our clients, thank you for retaining us, for rehiring us, and even for referring us to other clients.

These past five years have been the best five years in our business life and we wouldn't trade them for the world. We have grown and developed in our business acumen but more importantly as people. The bad times made us stronger. The good times make us grateful. We look forward to the next five years with great anticipation.

NEW DIRECTIONS

Our 5th Anniversary seemed like the perfect time to launch a complete redesign of our newsletter **directions**.

Those of you that know Suzanne are probably wondering what took so long. (She was over the old design years ago.)

Nonetheless, we hope you like the new look and feel of *Directions*. As always, if you have any comments or suggestions, give us a call at 888-411-5800 or drop us an e-line at sbjones@cbsg.com or mheisler@cbsg.com.

NEW CLIENTS

This last quarter saw many new experiences and opportunities for CBSG. It's poetic justice since we have just celebrated our 5th year anniversary in business! Let's start by taking a moment to welcome our new clients: **Keane Tracers Service Corporation**, **Peters Financial Services** and **AXA Financial**. We would like to thank several long-standing clients who we continue to support: **ING/Northern Annuities**, **ING/Aetna Financial Services** and **Kades-Margolis Corporation**. It's very gratifying to complete an assignment and then be asked back to support other initiatives.

KEYNOTE SPEAKING

We've been busy working on our new keynote speech, *From Cellmates to Soul Mates: How to Integrate Sales and Service*. CBSG's partners presented it in July for the first time and then conducted a focus group to gauge how the audience received the material. Armed with the suggestions from that group, we restaged the presentation on September 6 at the Hyatt Regency in Philadelphia. Both sessions were videotaped to provide material for a new marketing kit.



OUR UPCOMING BOOK

The early chapters of our book, which is based on our new keynote speech, are now being edited. We're still looking at a 2002 publication date. We'll keep you posted on our progress.

CBSG IN THE MEDIA



The media has been no stranger to CBSG partners. In addition to our regular features for the **MidAtlantic Business Alliance**, **National Tax-Sheltered Accounts Association** and the **Greater Philadelphia Hospitality Association**, CBSG was picked up in **Yahoo Finance**. In September, **Content Magazine** published CBSG's "Letter to the Editor" about a recent article on Harrah Entertainment's customer loyalty initiatives. Suzanne wrote an article on *Sales and Service Integration* for **EWoman Magazine** and Mark was interviewed for a **Comcast News (CN8) Newsmakers** segment on how businesses can avoid layoffs, which aired in the Philadelphia region in September. A short version of Mark's CN8 interview can be viewed on our web site: www.cbsg.com. Click on the home page hyperlink to the interview.

CBSG IN THE CLASSROOM

We also entered the world of academia, as we are teaching a new class entitled, "Sales and Service 1-2-3" for the **University of Pennsylvania Wharton School of Business Small Business Development Center**. If you're interested in registering for the course, call us at 888-411-5800.

Until next time...



WE PRACTICE WHAT WE PREACH

Never let it be said that CBSG doesn't follow its own advice. Just as we have recommended (or actually facilitated) for clients, we used the feedback from a focus group to test the marketability of our new presentation.

The recommendations, suggestions and constructive criticism we received transformed a good presentation into a vibrant, entertaining keynote presentation that can offer tangible, useful solutions to increase customer retention by integrating a company's sales efforts with its service delivery.

A well-planned focus group can assist in identifying issues, concerns or viability of your products and services. Here are the steps you should take when running a focus group session:

PREPARING FOR A FOCUS GROUP

- ▶ Identify your objectives for the session
- ▶ Develop questions that will draw out your objectives
- ▶ Plan detailed session agenda
- ▶ Select a facilitator
- ▶ Select an appropriate facility and invite attendees

FACILITATING THE FOCUS GROUP

- ▶ Follow the agenda
- ▶ Lead questioning and summarize comments of participants
- ▶ Ensure complete participation among members of the group
- ▶ Prepare report and comments objectively

THANK YOU VERY MUCH!

We want to take this opportunity to thank all our clients that we have enjoyed working with during these past 5 years.

- ▶ **ING/Northern Annuities**
- ▶ **Porter Novelli International**
- ▶ **ING/ReliaStar Life**
- ▶ **Zeneca Pharmaceutical**
- ▶ **Lincoln Investment Planning, Inc.**
- ▶ **Golf Greens Incorporated**
- ▶ **RTE Asset Management**
- ▶ **Amoroso Baking Company**
- ▶ **PMG Securities (division of Zurich Kemper Retirement Solutions)**
- ▶ **Robert Michael Communications, Inc.**
- ▶ **SEI Investments**
- ▶ **Peters Financial Services**
- ▶ **HRWebXPress.com**
- ▶ **ING/ReliaStar Worksite Financial Services**
- ▶ **Keane Tracers Service Corporation**
- ▶ **Kades-Margolis Corporation**
- ▶ **The Seely Agency**
- ▶ **Sigmund and Associates**
- ▶ **Righttime Family of Funds**
- ▶ **LBG, Inc.**
- ▶ **Virginia Retirement Specialists, Inc.**
- ▶ **ING/AETNA Financial Services**
- ▶ **AXA Financial**

