



**LW AND ASSOCIATES** is a business strategy and financial management advisory firm, providing businesses with growth strategies designed to increase revenues, profitability and productivity. The strategies integrate financial modeling with strategic marketing to build long-term sustainable growth. We help companies to achieve the next level of growth. Our expertise includes strategic planning, financial analysis and restructuring, marketing/selling strategies and internal efficiencies. We participate from strategy development through execution, using applied systematic methods to achieve results.

**THE STRATEGIC MINDSET**

The strategists at **LW AND ASSOCIATES** are multi-disciplined with industry-wide experience in assisting start-ups, established businesses, and companies involved in a turnaround/crisis situation. The chief strategist, Lori Williams, is involved in all client interactions. Lori has over 15 years of experience in strategic planning, finance, marketing and operations. She has functioned as a business owner, corporate officer and consultant in a variety of industries.

Lori holds an MBA from Pepperdine University, BS in Business and Management, an AA in Medical Science, and a Practitioner’s license in NeuroLinguistic Programming (NLP). Through a combination of real life experiences and academia, she has developed a unique balance of intellect, experience and interpersonal skills.

**Strategic Planning / Growth Strategies**

- ◆ Growth/Turnaround Strategic Oversight and Execution
- ◆ Strategic and Resource Gap Analysis
- ◆ Financial and Data Point Analysis
- ◆ Facilitation of Strategic Planning Sessions

**Financial Strategies**

- ◆ Internal Financial Review and Analysis
- ◆ Benchmarking: Profit Assessment and Review
- ◆ Financials Models and Spreadsheets
- ◆ Financial Packaging and Due Diligence

**Marketing and Selling Strategies**

- ◆ Concept to Market Strategies/ Marketing Plan Authorship
- ◆ Market Research-Assessment/Emergent Trends
- ◆ Market Intelligence: Competitor Research and Evaluation

**Internal Efficiencies**

- ◆ Process Restructuring and/or Reengineering
- ◆ Human Capital Development and Change Management

**SERVICES OVERVIEW**

## SERVICES DEFINED

LW AND ASSOCIATES focuses on **FOUR** main disciplines to achieve sustainable growth:

**Strategic Planning** is a crucial component used in the development of growth strategies, which includes a financial analysis, assessment of the marketing/sales strategies and internal efficiencies.

**Financial Analysis** includes monitoring the financial health, analyzing risk and ensuring the ability to support strategic initiatives and major transactions.

**Marketing/Selling Strategies** seeks to develop a unique competitive position which once leveraged can provide the company with a sustainable marketing advantage.

**Internal Efficiencies** have a direct effect on the bottom line and companies that have successfully developed efficient workflows achieve faster growth and higher returns.

## SERVICE CATAGORIES

LW AND ASSOCIATES defines the services by the **FOUR** following categories:

### Strategic Review and Assessment

LW and Associates follows a structured process, consisting of two to three key meetings, to provide business owners and executives a “quick assessment” of the company. It provides valuable insight as to where the company wants to go and the possible reasons that it is not achieving objectives.

### Strategic Oversight and Execution

LW and Associates takes an active role in both the development and the execution; beginning with a complete company analysis involving the four main disciplines above, advising in the development of strategic goals and direction and executing on both a strategic and tactical level.

### Project Specific

LW and Associates assist the client to achieve a clearly defined a scope of work as related to the four main disciplines above. Each project has an expressed outcome that is determined by the client with a set time for completion. The project may involve off-site research, on-site meeting facilitation or a mixture therein.

### Hourly Consultation

LW and Associates offers hourly billing for clients that want to arrange a limited number of one-on-one consultation meetings

## BUSINESS SIMPLY PUT (a division of LW AND ASSOCIATES)

Specially designed for budget sensitive clients, smaller companies and start-ups. Company owners and entrepreneurs can gain access to information through self-guided resources or attend classes ,which offer cost-effective training to increase executive and employee skill levels. On-site customized training is available. Companies can also purchase counsel and business guidance via email and phone. This includes financial assessment and benchmarking and business plan review.

To learn more about LW and Associates contact us at:

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