



People. Process. Planning.

Transforming Potential Into Profits



Who We Are

P3 is a collaboration of two leading consulting firms, Petey Parker & Associates and AK Advisory Partners LLC. We provide insight into the direction your business is headed by helping you define the reality presently existing in your company, coordinating that reality with your mission and providing hands-on guidance and solutions to achieve the results you desire.

The first step is to spend time together discussing your goals and expectations. We can then partner with you to conduct a strategic assessment, which will result in a solutions-based menu of options to help you meet your corporate goals through our P3 University. As training takes place, we can also assist you in putting the systems in place to easily monitor and measure the highest and best use of your people, planning and processes. As a result of our collaboration, your organization will be able to achieve its next higher level of performance and productivity.

At P3, we believe the keys to a thriving business are your:

- **People** - Having the right people in the right position at the right time
- **Planning** - Making sure that your strategic goals are and in sync with your resources
- **Processes** - Ensuring that you have the proper systems and tools in place

All 3 Ps must be operating at maximum efficiency for a company to successfully meet its strategic objectives. In addition, people must be properly trained; corporate goals must be realistic; and your processes must be designed to reach your productivity and profitability goals and expectations.

Now is the time to take a good look at the state of your business, discover and redefine your uniqueness and implement a plan of action. ***Let us partner with you to help you be the most effective and efficient organization that you can be.***

Our Solutions

Our P3 action-based solutions include:

1. People Solutions - Leadership, Management, Mentoring/Coaching and Training

As you assess your organization, you might ask yourself the following questions:

- Have we identified our expectation of each position? Do we have clearly-written and consistent job descriptions?
- Do we have the right balance of Leadership vs. Management?
- Is every employee working at their highest and best use?
- Are people trained and qualified for the positions they hold? Do we even possess the tools to make this assessment?





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The answers to these questions are vital to the growth of your business. P3 Consulting can help identify the gaps between wishful thinking and reality. As will be described below, P3 University's experienced faculty offers a full range of executive consulting, coaching and training courses to help ensure that your staff matches your organization's goals on every level.

2. Planning Solutions - Beyond Strategic Planning

P3 Consulting will analyze your Strategic Plan and offer suggestions on how to successfully implement your plans and help turn goals into reality. We may also suggest better ways of becoming more efficient, effective and productive at all levels of your firm. We will help you match your strategic plan with a mission and desired goals of your business and assure that the plan is clear and concise. We also help you put in a monitoring protocol which will allow for logical adjustments to be made if circumstances dictate over time.

3. Process Solutions - Change Management and Process Improvement

With planning and people in place it is imperative that your processes are designed to ensure that your business runs as productively as possible. Through P3 University, we have partnered with a diverse group faculty experts who can help you improve your daily operations, as well as create a long standing rate of return. Our assessment of your processes may necessitate that your organization undergo structural changes. We will guide you through this process so that the interests of your organization are met in a way that is consistent and long lasting.

Our Process

We begin with a Strategic Assessment of the three Ps with an eye toward designing and implementing a strategy to bridge the gap between where you are today and where you want to be tomorrow. Utilizing our proprietary consulting methodology, we work with management to assess its people, planning and processes to identify any obstacles keeping your employees from working at their highest and best use. This assessment results in a menu of recommendations that allow us to customize an implementation program specific to giving your organization the leading edge.

➤ P3 University

P3 University is our answer to your needs and the mechanism by which our recommendations and solutions become reality. P3 University is made up of top industry experts with whom we have partnered and who can address a wide variety of business and development needs. Utilizing our faculty of experienced leaders from a broad range of industries, we will work with you to develop a curriculum designed for your specific needs and delivered to your specifications; it can truly become *your* in-house University. For example, we can provide our services at your location, or arrange an off-site venue. We can design online options, including webinars. Whether your tailored curriculum entails one-on-one coaching, group training, a large group presentation, or a combination, our faculty has the expertise to lead you forward with measurable results.





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What would an in-house curriculum look like?

After we have presented the results of the assessment to you, and we have agreed upon a delivery method, faculty members would be selected to work with your organization and move your business forward. A measurement system for managing expectations would also be identified; terms would include pricing per module, timeline for completion, budget and measurable results expected. An acceptance agreement would clearly spell-out the expectations of all parties.

Delivery options include on-site, off-site, webinars or a combination of the three.

The examples below show defined modules used for three different industries:

Wealth Management Financial Firm

- Strategy – Product + Platform Development
- Structure – Merger integration, Process Improvement and Change Management
- Training – Corporate Individuals & Group Training
- Branding/Marketing

Real Estate Firm

- Merge Master for the negotiating and transition of a Merger of any size
- Communication Skills – Internal and external
- Management Training
- Business coaching and consulting

Mid-sized Corporation

- Beyond Strategic Planning
- Human Resources
- Working with Mid-Management

Our Founders and Faculty

We are proud of the strength of the faculty that we have partnered with. We have included short biographies of a few of them; please keep in mind that we will always be adding faculty on an on-going basis.

Founders

Petey Parker, Founder

(Areas of expertise - Assessment; Executive Coaching; Strategic Planning; Communication Skills)





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Petey has long been hailed as an assessor of people, planning and processes for Businesses, Associations and Non-Profit organizations. Her past experience as a corporate leader and Business Coach position her to serve as a guide for more progressive thinking and actions. Her hands-on approach makes the connection between your mission and goals and the reality of implementation with measureable results. She is dedicated to turning 'No Way Attitudes into Know How Solutions' as one of the founders of P3 Consulting. You can find out more about Petey at www.peteyparker.com.

Andy Klausner, Founder

(Areas of expertise - Assessment; Executive Coaching; Communication skills; Financial Services)

In his successful career and varied professional roles at preeminent small, midsize and large companies, Andy Klausner has gained an in-depth knowledge of the banking, brokerage and investment management businesses. He has developed an adaptable mix of mentoring, problem-solving and communications skills and a strong network of industry contacts and resources. He also has a reputation for decisiveness, honesty and fairness. He brings this diverse background and unique perspective with him to P3 Consulting as one of its founders. You can find out more about Andy at www.akadvisorypartners.com.

Faculty

Additional areas of expertise represented by our faculty include:

- Conflict/Reconciliation Protocols
- Customer Service
- Building Internal/External Trust
- Business Writing that Counts
- Sales Training
- Management Training
- Working with organizations Charity/Donor endeavors
- Merge Mastering (blending of organizations)
- Branding/Public Relations
- Human Resources

Please [click here](#) for a listing of our current faculty and biographical information.

Next Steps

Please contact us to set-up a complementary telephone consultation. Our goal is to take your organization to its highest and best level. Let us partner to manage your expectation and provide you with measureable results.

Please contact Elise DeCleva at (214) 363-9401 to begin the process and to set-up a call with Petey or Andy.

