



HELPING LEADERS OF MID-MARKET COMPANIES TO ACHIEVE ACCELERATED, SUSTAINABLE GROWTH

“Entrepreneurial leaders are deeply committed to their vision and engaged across the company, but often run into roadblocks when pursuing next-stage growth. As they add layers, they may find it difficult to maintain a strategic mindset. Translating their operating methods into a scalable business model is another big challenge. We help management teams develop the strategic plans, the operating systems, and the management disciplines they must have to achieve accelerated, sustainable growth.

A handwritten signature in black ink that reads "Juli Forstner".

Managing Partner, Pivot Point Partners

SYSTEMIC CHANGE

Our systematic process guides CEOs and their executive teams in developing the shared strategies, focused problem-solving, and data-driven decision-making they need to accelerate their growth. Our work helps clients build new “muscles” for strategic thought and leadership while giving them a repeatable model for managing their growth in the years ahead.

OUTCOME-DRIVEN

Focused on both immediate and longer-term results, we identify what a company must do to bridge the gap between its current state and its growth objectives. Our approach has given many businesses the means to extend their market reach, achieve cycle time improvements, strengthen their teams, and successfully compete in markets otherwise dominated by major corporations.

PIVOTAL INSIGHTS

Through comprehensive assessment, intensive executive team conversations, and rigorous business process analysis, we help companies define a critical path for continued growth and innovation. Working to optimize the core business while capitalizing on new growth opportunities, we enable business leaders to capture more value and manage ahead of their growth curve.

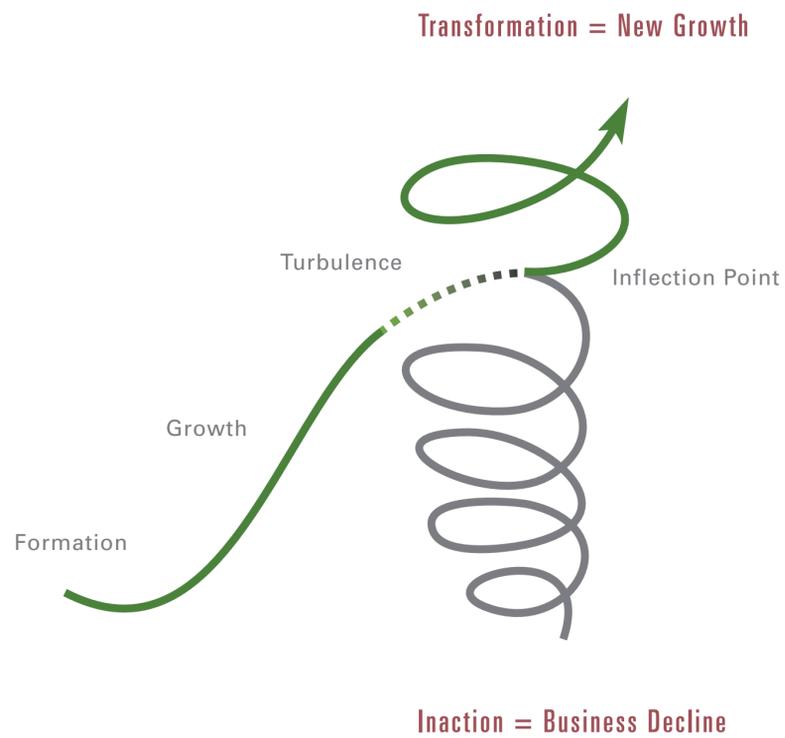
“In the past, we talked strategy but didn’t accomplish anything. Thanks to our work with Juli and her partners, over the past year, we have doubled our revenue while achieving our profit goals. We are more disciplined about serving all of our key stakeholders as we continue to grow a profitable business model.”

— Bill Birck, CEO, Reed Construction

GROWTH & SCALE

When young companies enter the marketplace with a new product or service, they often experience an initial surge of revenue growth. Almost inevitably, that steep growth curve flattens over time. The company may run into turbulence due to a maturing market or a crop of new competitors. Just as commonly, it may lack the core processes, the talent, or the management disciplines required to scale the business. The firm's leaders then find themselves at a critical inflection point — one where they must either take decisive steps to reinvigorate and grow their business, or see it slide into a downward spiral.

Corporate leaders can rarely escape this archetypal growth pattern. But you can plan for it and use that process to lift your business into a new growth phase.



Adapted from Catlin & Cookman Group

“Juli helped us build and capitalize on the repeatable franchise model that is the foundation of BrightStar Care. By guiding us at a critical time, she enabled us to continue growing rapidly and profitably.”

— Shelly Sun, CEO and Co-Founder, BrightStar Care

METHODOLOGY

Our repeatable, outcome-driven planning process addresses all the key elements in your business growth and success. It starts with a set of key metrics that reveal patterns in your company’s financial, market, and operating performance. We then work with you and your team to craft a strategic plan for accelerating growth from your core business as well as from new markets, customers, and product innovations.

Together, we translate that plan into clear action priorities, taking steps to engage stakeholders and increase accountability. We also establish a results-oriented system for management team meetings—one that shifts them from status reporting to focused problem-solving and decision-making. Finally, we make sure your company has the talent and capabilities it will need to execute on your plans.

You will come away with the mindset, the skills, and the tools you need to think and act strategically every day. You will also gain a framework for renewing your plans and rebuilding momentum in the years to come.



“Our work with Juli enabled me to see the big picture, develop a strategy, and execute on it. As a result, our growth has been more organized and planned. What’s more, we now have the processes to achieve the next round.”

- Celeste Gudas, CEO & Founder, 24 Seven Inc.

ABOUT

Juli Betwee brings a rare blend of corporate management experience, strategic thinking, and entrepreneurial know-how to her work with mid-market firms. Her 25 years of wide-ranging experience give her a keen understanding of the challenges facing CEOs who want to significantly grow and scale their companies. Prior to establishing Pivot Point Partners in 2003, she worked as an executive in Silicon Valley company pre and post IPO; co-founded MemeWorks, a software development firm; and was a management consultant with Ernst & Young, where she worked with start-ups and major corporations. She co-authored a guide to forging successful business partnerships, *Building Strategic Relationships: How to Extend Your Organization's Reach through Partnerships, Alliances, and Joint Ventures* (Jossey-Bass/Wiley).

Through Pivot Point Partners, Juli meets CEOs' needs for a trusted advisor and partner who can help management teams develop a shared vision, define and strengthen their businesses processes, and align the company around strategic growth plans and objectives. Juli personally leads all consulting engagements; she also draws on an extensive network of partners and collaborators to provide specialized expertise as needed.

As a complement to her consulting work, Juli leads two highly regarded CEO forums. She is also increasingly involved with the social impact movement and is on the advisory board of Santa Clara University's Global Social Benefit Initiative. The Program has graduated over 200 entrepreneurs that have positively impacted over 100 million people across the world.

Juli has been named strategic advisor to the board of Women Impacting Public Policy, an organization that represents the interests of entrepreneurs in the national policy arena. Formerly she co-chaired the Michigan State University Foundation Board of Directors, which grants millions of dollars annually to fund the University's intellectual property and research projects.

CLIENTS

ENTREPRENEURIAL BUSINESS

24/Seven
ASAP Solutions
Bishop Wisecarver Manufacturing
BrightStar Care
Casco Construction
Cenergy Corporation
Enterprise Management Fund
FYI Solutions
ForeScout Technologies
Mirror Show Management
Omgeo (Thomson Financial)
Palm Solutions Group
Parking Area Maintenance
Paula LeDuc Catering
Precision Tube Bending
Reed Construction
Torani Brands
Turtle and Hughes
Ungermann-Bass Network

CORPORATIONS

3 Com
Aon Insurance
BankAmerica Corporation
Cadence Design Systems
Canon
Central and Southwest Corporation
Chiron Corporation
Cisco
Coach
Ernst & Young
Exxon
Ford Motor Company
General Electric
Lucasfilm, Ltd
Marshalls
Mervyn's
McKesson Corporation
Motorola
Nike
Norwest Bank
Pacific Bell
Saatchi & Saatchi
The Gap Inc
The Limited Brands
Walt Disney Studios

NOT FOR PROFIT

American Leadership Forum
Catholic Charities
Center for Creative Leadership
Community Gatepath
Coro Foundation
EMQ Families First
Hospice of the Valley
Hinds Hospice
The Health Trust

HEALTH CARE INSTITUTIONS

Bayfront Medical Center
HealthCare Forum
Kaiser Permanente
Voluntary Hospitals of America

EDUCATION

Alameda Unified School District
San Francisco School Alliance

CEO FORUMS

As the Chair and Director of two CEO Forums, Juli Betwee knows what can result when chief executives convene with a focus on strategic issues and rigorous dialogue aimed at helping each other succeed. As she describes it, "There's a magic that happens" as breakthrough ideas arise from the wealth of experience and critical thinking in such a group. Both of the groups Juli leads are private and confidential; participation is by invitation only.



Women Presidents' Organization

... is a membership organization for women presidents of multimillion-dollar companies. Members take part in peer advisory groups that leverage the wisdom of the collective.



Alliance of Chief Executives

... is an active community of business leaders that focuses on deep strategic exchanges and on challenging existing assumptions. Through private, high-level, confidential groups, Alliance members share unique insights, perspectives and experiences that lead to breakthrough ideas and competitive advantage.

"As a participant in the WPO Platinum Group, I not only experienced the support of other CEOs, but also gained exposure to Juli's creative thinking and disciplined practices. It has had an enormous impact, giving me greater confidence to lead and grow and profitable global company."

— Kelli Saunders, CEO, Morai Logistics Inc.