

PERSONAL INFORMATION

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ASSIGNMENT HISTORY

- Gaming Provider
- Princes' Trust
- Retail Jewellers
- Public Transport
- Charity Governance
- Inventor
- Livery Company (NFP)
- Security Consultant
- Clothing Designer
- M&A in Recruitment/Consulting
- High Wealth Leisure
- High-End Tourist Sector
- Public Sector Charity
- Fine Art
- Property Management.
- Plastic Injection Manufacturing
- Office Furniture
- Property Development

CURRENT/LAST ROLE

- **Routes Business Cartographers – Director and Principle Consultant**

PERSONAL PROFILE

- An energetic and versatile MBA, covering Management Consultant/Interim Executive/Finance Director
- Vast experience in Governance reviews and audits both Financial and Process Aspects
- Hands-on experience having worked as and with executive levels across a wide range of Private, NFP and Third/NGO Sector organisations.
- Dependable, reliable, always positive, creative, energetic, articulate with a 'can-do' attitude and with an agility to empathise, motivate and bring the best out of people.
- Comprehensive proficiency in mentoring and coaching business owners/directors in addition to extensive experience in driving change programmes through knowledge transference, including business process re-engineering, mergers and acquisitions and service improvement programmes.

KEY SKILLS/EXPERIENCE

- **Strategy Development** – strategy development, supplier/product research, gap analysis, scenario evaluations, capability analysis, implementation planning, recruitment/team building and project/programme scoping.
- **Revenue/Cost Planning & Forecasting** – identification, scoping and delivery of organisation wide revenue and cost profiles, assumption testing, sensitivity analysis, scenario planning, process efficiency improvements.
- **People Management** – PPA Profiler, scoping/initiation, incentive scheme analysis, life cycle planning, vendor selection/management, stakeholder/relationship management, risk/issue management, training/coaching/mentoring provider.
- **Change Management** – business process re-engineering (BPR), merger/divestiture support, project management, structure profiling.
- **IT Management** – Advanced Financial Modelling: Budgeting, Forecasting and automation of Management Reporting
 – Microsoft Products: advanced skills in **Excel**; **Word**; and **PowerPoint**
 – Accounting Packages: **Access Accounts**; **Sage 100 to 500**; **Quick Books**; **Pegasus Opera 3**;

ASSIGNMENTS – DETAILED

2009 – Present

- **FLL (Gaming Provider) – Interim Management Accountant/Mentor**

Role Objectives:	Replace previous fulltime Finance Director's Reporting duties
Achievements:	<ol style="list-style-type: none"> 1. Conversion of Summary Accounts into Fully Functional Management Accounts 2. Successful Mentoring sessions with MD on future Strategies for company 3. Delivery of Updated Management Accounts - redrawing Reporting Lines
Key Skills/Key Words:	Small finance team, financial analysis, accounting advice, monthly board reports, trading and financial position, preparation of annual financial budgets (profit & loss, balance sheet and cash-flow), direct mentoring to CEO, proactive coaching, training and support to finance team

Retained by FLL to produce monthly Management Accounts, update annual Budgets, and regularly update Forecasts. Other requirements of the position relate to a mentoring role within the company. The role includes:

- Production of regular (on-time) monthly Management Accounts
- Questioning positive and negative variances
- Review monthly reforecast (to original annual Budget) with MD
- Update Forecast for the following Monthly Management Accounts
- Review monthly Pool Betting return
- Provide company accountant with necessary adjusting entries
- Provide external Auditors with YE information
- Regular review Balance Sheet Accounts for possible adjustments

2009 – Present

- **FLL (Gaming Provider) – Interim Management Accountant/Mentor**

Role Objectives:	Replace previous fulltime Finance Director's Reporting duties
Achievements:	<ol style="list-style-type: none"> 4. Conversion of Summary Accounts into Fully Functional Management Accounts 5. Successful Mentoring sessions with MD on future Strategies for company 6. Delivery of Updated Management Accounts - redrawing Reporting Lines
Key Skills/Key Words:	Small finance team, financial analysis, accounting advice, monthly board reports, trading and financial position, preparation of annual financial budgets (profit & loss, balance sheet and cash-flow), direct mentoring to CEO, proactive coaching, training and support to finance team

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2009 – Present

▪ **FLL (Gaming Provider) – Interim Management Accountant/Mentor**

Role Objectives:	Replace previous fulltime Finance Director's Reporting duties
Achievements:	7. Conversion of Summary Accounts into Fully Functional Management Accounts 8. Successful Mentoring sessions with MD on future Strategies for company 9. Delivery of Updated Management Accounts - redrawing Reporting Lines
Key Skills/Key Words:	Small finance team, financial analysis, accounting advice, monthly board reports, trading and financial position, preparation of annual financial budgets (profit & loss, balance sheet and cash-flow), direct mentoring to CEO, proactive coaching, training and support to finance team

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2011

(3 months)

▪ **YBI (Princes' Trust) – Transformation Consultant**

Role Objectives:	Accreditation Assessment of Kenya Partner
Achievements:	1. On time delivery of Accreditation Assessment to Accreditation Committee 2. Successful delivery of a Change Management Programme in Kenya 3. Successfully obtained Accreditation for Kenya 4. Invited to give lecture to YBI (UK) on Change Management
Key Skills/Key Words:	Collaborative with partner agencies; empathetic, creative, personal resilience, motivate, project management, deadline driven, strong Reporting, Word, PowerPoint and Excel skills

Retained by YBI of The Princes' Trust to assess their Kenyan Partner, covering both Nairobi and Mombasa offices. The role included:

- Phase I – Accreditation Assessment (as regulated by YBI London) of Kenyan Partner
- Phase II – Blueprint Change Management requirements needed to obtain Accreditation
- – Mentor/Coach Kenyan Trustees on Change Management objectives (both in Kenya and from UK)
- Phase III – Reassess Kenya Partnership and produce Accreditation Report for Accreditation Committee

2009 – 2011

(16 months)

▪ **KJL (Retail Jewellers) – Interim Management/Mentor/Coach**

Role Objectives:	Assess the viability of the Company on behalf of Investor
Achievements:	1. On-time delivery of 'Health Check' report 2. Successful delivery of Change Management Programme 3. Successfully coached directors on their personal KPIs 4. Successfully mentored directors on the production of staff KPIs/Action Plans 5. On-time and on Budget delivery of computerised Accounting Process 6. Early production of Company's annual Statutory Financial Statements 7. Production of Company's 1 st Annual Budget 8. Creation of Management Accounts Report template
Key Skills/Key Words:	Stakeholder management skills, strategic planning, strategic analysis & development tools, financial restructure, corporate strategy in the SME environment, communicator and influencer skills at all levels, substantial operational and change consulting experience, commercial thinking flexibility, entrepreneurial understanding, business advisory in SME sector, business transformation, benefits & change management, strong client relationship developer, collateral development, thought leadership contributions, knowledge management, outstanding communication skills, comfort in presenting to senior executives/ business owners

Initial contract was to assess viability of KJL as a consolidated company and its 4 separate Retail Outlets. The contract was expanded to cover the coaching/mentoring of the Directors, and the input, as Interim Management. The roles involved:

- Draw up a full viability report on the full business and its units
- Develop a training strategy for the management
- Facilitate Business Planning workshop for management
- Create and facilitate SBU Budget Planning
- Mentor and Coach Operations Director/Owner
- Install Accounting processes and software for Group

- Acting as Interim Manager for the following:
 - Capture of prior year's accounting transactions on new accounting package
 - Full reconciliation of Balance Sheet accounts as at end of prior accounting year
 - Production of prior year's Statutory Financial Statements
 - Source Bookkeeper
 - Ensure accounting transactions captured and reconciled to bank statement
 - Create a Management Accounts package for monthly reporting

2009
(2 months)

▪ **LTW (Public Transport) – Management Development/Training Consultant**

Role Objectives:	Encourage Team Work/Agree an Action Plan for Team delivery of Business Plan
Achievements:	<ol style="list-style-type: none"> 1. On-time delivery of Team Action Plan 2. Successful 'buy-in' of Team to achieving agreed milestones 3. Vote of thanks from CEO for the contributions made
Key Skills/Key Words:	Proactive coaching, training and support, tactical coaching, support and training to improve quality, skill and knowledge individually, workshops and 1-1 coaching, assist/advise small enterprises to develop realistic business review plans

Contracted to assess LTW's Business Plan and create a workable Action Plan to ensure improved success on KPI's. The role involved:

- Working with Senior Management on existing methodologies
- Assessing Management profiles
- Creation of a workable training programme for all levels of management
- Formation of an Action Plan – acceptable to the Management
- Feedback (in the form of a report and face-to-face meetings) to the CEO and HR Director

2008 – 2010
(33 months)

▪ **SACGD CIC (Charity Fundraising) – Interim Finance Director**

Role Objectives:	Incorporate an existing Fundraising organisation
Achievements:	<ol style="list-style-type: none"> 1. On time formation of CIC 2. Successful implementation of accounting and administration 3. On time production of statute accounts
Key Skills/Key Words:	Responsibility for all financial matters of the business, managing a small finance team, providing financial analysis and advice, regular board reports, company's trading and financial position, preparation of year end statutory accounts, financial monitoring and systems development, strong Word, PowerPoint and Excel skills

Brought into SACGD CIC to transfer business from unincorporated to incorporated. Historically the organisation was run in the name of the founder. The business had grown to one of the largest one-day Golf Days in the UK. Responsibilities included:

- Formation of the incorporated company (as a CIC)
- Development of appropriate Memorandum and Articles
- Implement full accounting processes
- Leading all aspects of the company's financial affairs
- Full control of all Banking relating to the Golf Day – covering 320 players/500 dinners

2007 – 2008
(14 months)

▪ **ALB – Swiss Company (Inventor) – Management Consultant/Mentor**

Role Objectives:	Inventor – Production of a Business Plan to assist in sourcing Investor Funds
Achievements:	<ol style="list-style-type: none"> 1. Successfully coached Inventor on Company Structures 2. Successfully facilitated the dissolution of the Swiss business
Key Skills/Key Words:	Substantial operational and change consulting experience, confidence and the ability to think commercially, good SME advisory skills, client relationship development, strategic planning skills and development of business operating models, outstanding communication skills, comfort in presenting to senior executives, ability to communicate articulately, effectively and with passion at all levels of business, a flair for building excellent client relationships, delivering inspirational mentoring

Retained to consider the appropriateness of an existing Swiss Registered entity for the purpose of obtaining completion of a Patent Application, and the funding thereof. The role involved:

- Coaching the Owner/Inventor on the aspects of company structures
- Mentoring the Owner on medium and long term Strategic decisions
- Reconciling the financial history of the business
- Arbitrate between Owner and stakeholders

2007 – 2008
(14 months)

▪ **WCoMC (Livery Company – NFP) – Pro-Bono Management Consultant**

Role Objectives:	Provision of Pro-Bono Consulting to the 3 rd Sector (Charities/NGO/Not-for-Profit)
Achievements:	<ol style="list-style-type: none"> 1. All projects delivered on time 2. Awarded a 'paid' assignment directly from quality delivered on 'pro-bono' Project 3. All Charities officially thanked the Worshipful Company for work delivered
Key Skills/Key Words:	Project Management experience/understanding in 3 rd Sector environment; working collaboratively with partner agencies; in-depth knowledge of Charity finance (SORP) and funding, empathetic, creative, have personal resilience and able to motivate, responsible for producing management information to agreed deadlines, strong Excel, Word and PowerPoint skills

Worked with the following Charities (plus summary of assignment):

- Youth Business International (YBI) {2011} – Accreditation Assessment on Kenyan Partner, covering Nairobi and

- Mombasa, reported to London Accreditation Committee
- AfriKids {2011} – Report on Charity’s Business Plan, a SWOT analysis
- Community Network {2009 – 2011} – Mentored CEO covering Change Management
- Dulwich Helpline {2009} – Report to Trustees on strengths/weaknesses of CEO’s Change Strategy
- Kent Music {2009} – Assessment of Change Strategy re Accounting Division, particularly covering Staffing and Structure
- CALM {2008} – completion of ‘incomplete’ accounts, production of SORP financials, and introduction of computerised accounts

2007
(4 months)

▪ **SCI (Security Consultant) – Management Consultant**

Role Objectives:	Develop a Strategy Leading to an Exit Plan
Achievements:	<ol style="list-style-type: none"> 1. Successful development of Strategic Plan 2. Successful construct of 6 Year Business Plan 3. Robust Scenario Planning leading to accepted Exit Plan
Key Skills/Key Words:	Excellent stakeholder management skills, strategic planning, the business portfolio, capital allocation, new market entry, innovation and product development, Strategic analysis and development tools, sound financial skills and stakeholder influencing capabilities in the SME environment.

Engaged to facilitate Strategy Plan, leading to development of Business Plan (including Financial Estimates) and ultimately an Exit Plan for the Owner/Founder of SCI. The role involved:

- Completion of full review of existing collaborative businesses
- Facilitating the development of a Corporate Strategy
- Facilitating the production of a 6 Year Corporate Business Plan
- Creation of an appropriate 6 Year Financial Forecast
- Develop Scenario Planning for Exit Plan

2006
(9 months)

▪ **MSG (Clothing Designer) – Management Consultant/Mentor**

Role Objectives:	Full ‘Health Check’ Review of Business prior to a Demerger
Achievements:	<ol style="list-style-type: none"> 1. On-time and on-budget delivery of a Health Check Report 2. Successfully negotiated a favourable ‘demerger’ agreement for the minority shareholder 3. Effectively developed the 5 Year Strategic Plan for the demerged business 4. Positively mentored the CEO to achieve Key Milestones in the Business Plan
Key Skills/Key Words:	Deal origination experience, corporate strategy and the SME environment, an accomplished communicator and influencer at all levels, a track record in solution selling. Proven track record of consulting experience, with operational and change experience, Confidence and the ability to think commercially. Business advisory and Mentor in SME sector.

Contracted to deliver an unbiased Health Check report on a Group subsidiary business, MSG, for the minority shareholder wishing to demerge the company. The assignment was expanded to include the negotiation of the demerge and then the development of the 5 Year Strategic Plan for the demerged company. The role involved:

- Complete non-financial audit of MSG
- Assessment of all financial operations within the company
- Development of the 5 Year Strategic Plan
- Enhancement of existing operational processes

2005 – 2008
(30 months)

▪ **Project Javelin (M&A in Recruitment/Consulting) – Management Consultant /Mentor/Interim Manager**

Role Objectives:	Delivery of a BIMBO Team for a £30m Acquisition Deal
Achievements:	<ol style="list-style-type: none"> 1. On-Time delivery of BIMBO Team 2. Effectively Mentored CEO through Acquisition Deal 3. Development of a complex Financial model for the Acquisition, which successfully withstood the rigours of KPMG’s due diligence tests
Key Skills/Key Words:	Excellent stakeholder management skills, strategic planning, new market entry, innovation and product development, Strategic analysis and development tools, sound financial skills and stakeholder influencing capabilities. M&A / corporate development / deal origination experience. An accomplished communicator and influencer at all levels, a track record in solution selling. Proven track record of consulting experience. Confidence and the ability to think commercially. Business advisory in SME Sector, change management. Client relationship development, Practice enhancement (collateral development, thought leadership contributions, knowledge management), and development of business operating models, experience of Sell/Buy side. Transaction Advisory, Due Diligence and Post Transaction. Outstanding communication skills; comfort in presenting to senior executives, both internally and among clients; ability to communicate articulately, effectively and with passion at all levels of business, A flair for building excellent client relationships through Mentoring. proactive coaching, training and support, tactical coaching, support and training to improve quality, skill and knowledge individually

Initially retained as Consultant to Project Javelin with task of assembling a strong BIMBO Team for a £30 million acquisition within the IT Consulting and Resource Sector. On successfully completing this task I then worked on 2 sub-set assignments – Mentor to the CEO; and Acting FD (Interim) for the Acquisition. The roles involved:

- Resourcing, from my network, the personnel adequately qualified for such a deal
- Overseeing all meetings held by the CEO (designate) as Mentor
- Engaging with the production of the Business Proposal
- Preparation of an adequately robust and complex Financial model to support the Business Proposal
- Implement and enhance Processes and Support Systems within the Acquiring Group to a standard commensurate with a large investment

2004
(3 months)

▪ **ARL (High Wealth Leisure) – Management Consultant**

Role Objectives:	Review Business Plan as to why not successful in attracting investment funders
Achievements:	<ol style="list-style-type: none"> 1. On time delivery of Business Plan Review 2. Complete reappointment of Business Plan 3. Regeneration of Financial Plan reducing funding requirements from £30 million to £3 million
Key Skills/Key Words:	Strategic planning, new market entry, innovation and product development, Strategic analysis and development tools, sound financial skills and stakeholder influencing capabilities, Corporate development within the SME environment, communicator and influencer at all levels, solution selling, training and support, tactical coaching, support and training to improve quality, skill and knowledge transference. Responsible for suitable interventions, workshops and 1-1 coaching, delivering inspirational mentoring to the development of realistic business review plans and assist client in developing requisite skills such as financial reporting and marketing

Initial task: to review the content of a Business Plan that had so far failed to meet the objective of raising investor funds. The review developed into a 3 phase assignment, namely: I) Initial review; II) Complete overhaul of Business Plan; and III) Creation of a robust financial forecast underpinning the Plan. The role involved:

- Production of a Review Report on existing Business Plan (Phase I)
- Facilitate shareholder workshops for the overhaul of Business Plan
- Leadership in the rewriting of the overhauled Business Plan (Phase II)
- Preparation of 5 Year Financial Forecast model based on assumptions drawn up under Phase II (Phase III)

2004
(3 months)

▪ **TAC (High End Tourist Sector) – Interim Management**

Role Objectives:	Delivery of a UK Marketing division for a South African Boutique Tour Operator
Achievements:	<ol style="list-style-type: none"> 1. Production of a robust and investor acceptable Business Plan 2. Brought on board upmarket brand names, i.e. Wentworth Golf Club; European PGA; and Macdonald Hotels
Key Skills/Key Words:	Consulting engagement delivery (including team leadership, project administration, client liaison), Strategic planning skills and development of business operating models, experience of Sell/Buy side Transaction Advisory, Outstanding communication skills; comfort in presenting to senior executives, both internally and among clients, The ability to communicate articulately, effectively and with passion at all levels of business. Providing direct mentoring to assist client in developing requisite skills such as financial reporting and marketing

Retained as Interim Management with a remit to develop a UK/Europe marketing company as a division of The African Collection (Pty) Ltd based in Johannesburg. The scope included the creation of a robust Business Plan, sourcing of UK/European investment funds, and the bringing together of resources adequate to drive a marketing campaign to the discerning traveller. The role involved:

- The formation of a UK entity;
- The development of a 67 page Business Plan, adequately covering all issues required for resourcing and funding;
- The resourcing of specialists to enable a seamless rollout of the marketing campaign
- The identification of appropriate funders

2002 – 2008
(63 months)

▪ **VSB (Public Sector Charity) – Trustee/Treasurer/Chairperson**

Role Objectives:	Oversee the Governance of VSB as directed by the National Association of Victim Support Schemes (NAVSS)
Achievements:	<ol style="list-style-type: none"> 1. Successful delivered upon all KPIs set for VSB by NAVSS 2. On time delivery of Audited Annual Accounts (SORP) to Charity Commission 3. Successful closure and merger of VSB to National Victim Support during its merger in 2008
Key Skills/Key Words:	Trusteeship, Strategy development, cultural change/alignment, merger/divestiture issues, project/programme management, staff recruitment, retention and training, relationship management, budgetary/cost control, problem management, change management.

Elected as Trustee to VSB Management Committee (12 Trustees) to oversee the governance of the Charity in accordance with the National Council's Code of Practice. Responsibilities included:

- Chairing bi-monthly Management Committee meetings;
- Delivery of VSB's monthly Financial Statements to all Trustees and National Council
- Attending to all staff related matters, which included recruitment, volunteer assessments and salary increases; and
- Direct Management line reporting of Borough Manager
- Representing VSB at Victim Support London (VSL) quarterly meetings

Specific projects/programmes included:

- Elected to VSL Board of Directors for period leading up to National Merger of all Victim Support Charities
- Elected as Chairperson of the VSL Finance Sub-committee
- Integration/Merger of VSB Charity into a single National Victim Support Charity

2002
2 months

▪ **FTS (Fine Art Dealer) – Interim Management Accountant/Mentor**

Role Objectives:	Produce suitable Monthly Management Accounts Package for Investor/Owner
Achievements:	<ol style="list-style-type: none"> 1. Successful delivery of Monthly Management Accounts Package for use by FTS 2. Continued Mentoring Owner/Director after completion of Role Objective 3. Special Project (2005): On time delivery of 5 year Budget for Prospective Investor
Key Skills/Key Words:	Cultural change management, staff re-assignment/termination, director/shareholder relationship building, financial/cost control, mentoring, management problem solving.

Awarded short-term assignment, which included:

- Address shortfall in operational processes;
- Reconcile Control Accounts within the Accounting Records; and
- Production of a suitable Management Accounting Report for Directors/Investors

Specific projects (awarded in addition to the above-mentioned assignment) included:

- Ongoing mentoring programme for MD – continued for 2½ years (monthly 2hr sessions)
- On time delivery of 5 year Budget for use by Owners/Investors

2001
9 months

▪ **EG PLC. (Property Management) – Interim Financial Controller**

Role Objectives:	Integrate/Develop and Manage the Group Finance Division.
Achievements:	<ol style="list-style-type: none"> 1. On time delivery of Group Accounting Systems and Processes 2. On time delivery of merged Property Service Charge Accounting suit 3. Special Project A: Date specific delivery of Consolidated Budget covering 10 subsidiaries 4. Special Project B: On time delivery of Paper Flow Management Report
Key Skills/Key Words:	Project/programme management, recruitment/team building, budgetary/cost control, problem/ change management, staff re-assignment/termination.

Retained as Financial Controller to map out and then implement financial processes during the shareholders M&A strategy. Responsibilities included:

- Delivery of a 'best practice' Property Service Charge Accounting suit across the multiple merged entities of the Group;
- Treasury control over the Group Banking and Deposit Accounts;
- Production of monthly consolidated Group Management Accounts

Due to successful delivery of the above two Special Projects were awarded to me, which were delivered on time.

WORKSHOPS DELIVERED – DETAILED

2011 ▪ MC (Theatre Sector) – Discovery Workshop

Role Objectives:	Facilitate a review of the Shareholders Strategy
Achievements:	1. Successfully facilitated a complete and robust review of the Corporate Strategy
Key Skills/Key Words:	Strategy development, Coaching, Action Plan

Purpose included:

- MC's shareholders/Directors required 3rd Party assistance in reviewing their Business Proposition
- Half-day facilitation of driving an in-depth review of MC's Corporate Strategy

2009 ▪ ACA (IT Consulting) – 3P Triangle© Workshop

Role Objectives:	Address the Company's Production of a Start-Up Business Plan
Achievements:	1. Successful use of the 3P Triangle© 2. Successful consolidation of Corporate Strategy 3. Successful Action Plan outcome
Key Skills/Key Words:	Strategy Analysis and Development, Action Plan, Coaching, new market entry, innovation and product development, Development of Critical Path from Strategy to Implementation – using 3P Triangle© Model

Purpose included:

- ACA considered their Business Strategy and Plan were in need of review
- Shareholders agreed to employ external assistance in performing a review (initially sceptical)
- Use of a 3P Triangle© Workshop (2 days)
- Facilitating the co-founders of ACA to fully interrogate the company's Strategy
- Allow the Directors to better understand the SWOT of ACA
- Develop an effective Action Plan to finalise the company's business plan

2009 ▪ QL (Software Development) – Discovery Workshop

Role Objectives:	Facilitate an Open Review of the Company's existing Strategy
Achievements:	1. Successful use of 'Blue Sky Thinking' 2. Acceptance by Owners to the creation of a workable Action Plan 3. Better understanding, by the Owners, of what constituted 'Products' the Company could deliver
Key Skills/Key Words:	Strategy Development, Coaching, Action Plan

Purpose included:

- Qualia was not showing the growth anticipated
- Owners were looking for external help in identifying why the company was not growing
- Facilitate the Owners to give content to an achievable Growth Strategy
- Acceptance of an achievable Action Plan

2009 ▪ BL (Social Networking) – Discovery Workshop

Role Objectives:	Facilitate Owner's Review of Business Plan
Achievements:	1. Successfully identified 2 critical areas of weakness
Key Skills/Key Words:	Strategy Analysis, Mentoring, Action Plan

Purpose included:

- Beauforts Owner was looking for independent review of an Internet Subscription led Software Product
- Discovery Workshop assist in Beauforts questioning (without bias) existing Strategy/Business Plan
- Facilitate Action Plan to work on SWOT of Plan

2008 ▪ AL (Software Provider) – Discovery Workshop

Role Objectives:	Consider Owner's Business Strategy
Achievements:	1. Successful delivery of SWOT analysis on existing Strategy 2. Production of Action Plan assisting Owner to address Delivery of Strategy
Key Skills/Key Words:	Strategy Analysis, Mentoring, Action Plan

Purpose included:

- Assisting Owner to consider a SWOT analysis to identify existing Business Strategy
- Insurance that the Workshop would assist in delivering direction

2006 ▪ Project 36 (Knowledge Wharehousing) – 3P Triangle© Workshop

Role Objectives:	Start Up Business Owner required better understanding of how to establish a business
Achievements:	1. Successful use of 3P Triangle©

Key Skills/Key Words:	Strategy Analysis and Development, Action Plan, Coaching, new market entry, innovation and product development, Development of Critical Path from Strategy to Implementation – using 3P Triangle© Model
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Purpose included:

- Assisting Business Owner to better understand the requirements of setting up business
- Allowing Owner/Director to plan out what Actions were required to achieve the existing Business Strategy

2005

▪ **O PLC. (Research Provider) – Discovery Workshop**

Role Objectives:	Senior Management concerned re lack of repeat business from Client Base
Achievements:	1. Successful creation of Action Plan by senior managers
Key Skills/Key Words:	Strategy Analysis, Mentoring, Action Plan

Purpose included:

- Facilitation of 'Working Together' Workshop for Senior Management
- Acceptance by Senior Management of driving improved communication of Front Line staff/contractors
- Production of Action Plans to achieve agreed objectives

2005

▪ **COL (Online Subscription Provider) – 3P Triangle© Workshop**

Role Objectives:	Facilitate Owners/Directors to consider the Business Strategy
Achievements:	1. Successful use of the 3P Triangle© model 2. Positive response to Action Plan produced throughout Workshop 3. Owners/Directors
Key Skills/Key Words:	Strategy Analysis and Development, Action Plan, Coaching, new market entry, innovation and product development, Development of Critical Path from Strategy to Implementation – using 3P Triangle© Model

Purpose included:

- Compliance Online were concerned their business product was not delivering expected results
- Owners/Directors wanted an unbiased arbitrator to assist their direction
- Consideration as to what the possible faults of the existing Business Strategy were
- Taking the appropriate action to address improvements to business product delivery



PRE 2000 WORK HISTORY – SUMMARY

- 1994 – 2000
 - **Elliotts, registered Accountants – Partner** – initially retained to set up consulting division of this accounting practice. Became the firm's Client Business Planning specialist, plus expert on VAT and Income Tax matters. Achieved: 17% (£250k) increase in the Firm's Fee Income; improved staff use of MS Office suit of programmes through creation of training academy within the practice.
- 1989 – 1994
 - **Cruickshank Business Consultancy – Owner** – set up boutique consultancy providing Financial Interim Management and Management Consultancy to SME Sector. Achieved multiple successes helping a number of small businesses provide financial budgets to high street banks, during one of the UK's worst post War Recessions. Major clients included: Interkraft Ltd (office furniture supplier – London); New Plastics Company (plastic injection moulding – Aldershot)
- 1988
 - **SAB Group: Miraflores Ltd – Group Finance & Admin. Manager** – moved from SA to UK (London) to set up consolidated controls on this international property development company, with first development based in Spain (commuted to Spain on weekly basis over 12-month period). Achievements included: Complete computerisation of systems in UK & Spain; introduced international accounting processes across all Group entities; implemented consolidated management reporting package for Group.
- 1985 – 1988
 - **SAB Group: Southern Sun Hotels (Timesharing division) (Pretoria, SA) – Finance Manager** – originally brought in to address the poor back-office reporting functions. Achievements include: complete overhaul of the Monthly Management Reporting package; successful project leadership in switch from legacy computer system to first of the IBM PS2 PC systems (plus Server); Award of Excellence for improvements made to back-office reporting and improved personnel relations.
- 1982 – 1985
 - **Wood Creations (Jo'burg, SA) – Finance Director** – employed to take control of the finances of a failing office furniture components manufacturer and help turn it around. Duties included all aspects of the finances of the company. Achievements included the full computerisation of the company's ordering and accounting system; the expulsion of a most expensive invoice factoring agreement; and, in collaboration with the MD, obtained grant funding for the strategic supply of raw materials to the company's supply chain
- 1981
 - **Thomas Cook (Jo'burg, SA) – Accounts Manager** – brought in to bolster the accounting department, through its transition from a manual to a computerised system. Duties included controlling 8 back-office accounts staff, managed transference to new computer systems and the all-important Treasury function within the Travel Industry, namely: ensuring adequate Forex cover over foreign debt; obtaining best money market rates on all surplus cash funds; and ensuring prompt payment of all airlines and other major creditors.
- 1977 – 1980
 - **Deloitte Haskins & Sells (Jo'burg, SA) – Audit Senior** – completed my 5-year Articles. Duties included Planning for audit teams (up to 10 staff), Manage Client Audits and liaise with Audit Partner on Client Reporting. Covered a number of Plc. Clients. Particular achievement – uncovered a large fraud with a public listed company
- 1974 – 1976
 - **Levitt Kirson (Jo'burg, SA) – Audit Articled Clerk** – 3-years of my 5-year term of Articles. Duties included Planning, Auditing and Client Management Reporting prototype to a number of Clients of the firm – most Clients were small/medium re Turnover.

EDUCATION & PROFESSIONAL HISTORY

- Middlesex University, London – DProf (Work Based Learning Doctorate): on-going from 2011, Major Research Work: Behavioural Sciences in the Workplace. **Programme Suspended due to work load**
- Henley Management College, Henley-upon-Thames, Bucks – **MBA**: 2003, Dissertation: Internet Marketing
- Witwatersrand University, Johannesburg, SA – **B. Comm**: 1984, Majors: Accounting and Commercial Law
- Professional Status:

<ul style="list-style-type: none"> ▪ Certified Management Consultant (CMC) ▪ Fellow of Institute of Consulting (FIG) ▪ Member of Chartered Management Institute (MCFI) 	<ul style="list-style-type: none"> ▪ Member of British Computing Society (MBCS) ▪ Member of Richmond Group (Independent Consultants) ▪ Registered Thomas International Profiler - PPA
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HOBBIES, INTERESTS AND ACTIVITIES

- Charity Work through Worshipful Company of Management Consultants
 - Liveryman
 - Freeman of the City of London
- Golf enthusiast
 - Member of Hadley Wood Golf Club
- Sports enthusiast
 - Rugby, cricket and snow skiing
- Travelling
- Reading
- Music

GENERALITIES

- UK Citizen – born Inverness, Scotland
- Full UK Drivers Licence
- References available on request