



CUSTOMER TESTIMONIALS

Succession and Transition Planning

John Coast Sr. owned and operated the closely-held, family-owned business Coast Machinery for 28 years in Baton Rouge, Louisiana. As he began considering retirement, he was faced with two choices: sell the business or transition the company to his son John Jr., who had been serving as Coast Machinery's manager of operations for the past five years. To spearhead the retirement discussion, Lisë Stewart was retained.

"Lisë Stewart came down and spent a day talking to my parents and family about my father's retirement. She was able to be an objective third-party or mediator for both sides. She facilitated a discussion on my father's retirement that moved him forward and got the transition started. Lisë also engaged me in my new role by providing advice on how to go from an operations manager to president of the company. It's a lot more responsibility. Lisë engaged me on not doing everything myself, and she provided ideas on how to form a good team. She also suggested mentors: men who have run their own successful businesses. I now have several mentors I meet with on occasion and I've benefitted from the meetings. At first I was a little apprehensive about the transition - I didn't know what to expect - but my role didn't change all that much like I thought it would. Although we're not finished, the transition has been smooth and positive."

**– John S. Coast, Jr., President
Coast Machinery, LLC
Baton Rouge, Louisiana**

Performance and Talent Management

As a small business owner, Samuel Zink wanted to optimize the organizational success and profitability of his company. To maximize the "people" side of the business, Zink retained partner Tami Trout.

"I contracted with Tami to provide assessments on virtually all of my staff, with follow on coaching, recommendations and guidance. She was very systemic in her approach, a whole systems-thinker. During her assessments, she revealed new and innovative ways to delegate, set expectations while holding people accountable, and she worked with existing systems or she created new ones to measure progress. She had a unique ability to do this while my staff maintained their own unique style, strengths and personality."

**– Samuel Zink, President
ComputerSTOP Inc.
Nampa, Idaho**

Workshops and Public Speaking

As a part of the Stanislaus Economic Development and Workforce Alliance, the Alliance Small Business Development Center helps new and existing businesses resolve financial, marketing, production, organization, and technical problems. It provides consulting, training, and research assistance in all aspects of business operations, management, and start-up procedures. The Center provides training including workshops and presentations on topics relevant to the small business. Lisë Stewart has been commissioned to present workshops for the Center, and continues to be partner in helping small businesses thrive.

“On two different occasions, Lisë Stewart has facilitated half-day programs for our local Family Business group. Lisë demonstrated exceptional depth of knowledge on a variety of issues and challenges affecting family/business relationships and interactions. Lisë’s warm and engaging personality holds peoples’ interest and encourages high levels of interaction. Our 150+ program attendees have enjoyed Lisë’s presentations so much we are bringing her back for another half-day seminar later this year [2009].”

– **Kurtis Clark, Director**
Alliance Small Business Development Center
Modesto, California

Recruitment and Selection

Under the leadership of Donald Mayeaux, founder of A+ Corporation, this family-owned business has developed an excellent reputation and a wide network of customers and distributors. Keith Mayeaux, President, and Sheila (Mayeaux) Harvey, CFO, were evolving their functional roles as Donald prepared to transition away from the day-to-day operations of the company. One of the necessary steps to achieving a successful transition and providing more focus on the distributor network and strategic partnerships was to hire a highly capable Senior Sales Position. Tami Trout was retained to lead this process and teach the management team how to use Galliard Group’s systematic, proven methods for future hires.

“Our whole team received so much from going through this [hiring] process with Tami and, while it was very foreign to us, we trusted Tami and the process to produce the desired result. The result was a truly difficult decision between two awesome candidates, and my dad was thrilled with the process and the result. Thank you, again, for all that the Galliard Group has done for our company. We are thrilled with our affiliation with your company, and look forward to many more equally challenging and fun projects with you and your team.”

– **Keith Mayeaux, President**
A+ Corporation, LLC
Gonzales, Louisiana

Leadership Development

Clearview Cleaning is a highly successful commercial janitorial business specializing in 'green' cleaning, using cleaning products that do not endanger people, pets, or the environment. Sylvia Hampel, Owner, retained Tami Trout to conduct an assessment of her and her staff in order to openly discuss individual traits and how best to use these traits to work more effectively together.

"Tami's assessment system [ProScan], which she uses with individuals and corporations, was extremely helpful to me to gain insight into my strengths and weakness as a business owner. It helped me understand what I needed to do in order to become better at my business and to gain that great relationship all of us want to have with our staff. I recommend Tami to anyone who wants professional leadership guidance.

**– Sylvia Hampel, Owner
Clearview Cleaning
Boise, Idaho**

Family Business Advisor (FBA) Program – Level 1 Workshop

Many consultants working within the Manufacturing Extension Program across the U.S. are finding Galliard Group's FBA workshop to be invaluable in helping them expand their service offering and provide greater support to their manufacturing clients.

"I would sum it up as Galliard brings; research, structure, and the confidence that only comes from real world experience. There are many issues that permeate the family-run manufacturing business. Some related to the business, some related to the family. In the majority of the cases we cannot effectively help the business unless we are successful at addressing the needs of the family. Galliard provides the tools, the process, and the support allowing us to address the latter which greatly enhances our ability to help improve the business."

**– Randy Bertram, Regional Manager, Central
Wisconsin Manufacturing Extension Program (MEP)
Madison, Wisconsin**

"Through MEP, the Galliard Group recently launched a Family Business Advisor program for [MEP] centers (which I have taken) that provides us with another incredibly valuable tool to help us prevent these business types from thinking the only option to succession is closing the doors. We have a lot of these companies in our region and really can't afford to lose these small, but important employers. We also finally feel -- after looking for years -- that we have found a way to better serve the succession needs of the many family- and closely-held businesses of our region."

**– Patricia K. Wilson, Deputy Director and Director of Marketing
CITEC, Inc. – Manufacturing and Technology Solutions
Potsdam, New York**