

WEXFORD

Partners
Driven By Your Business Potential

Company Profile

63334 Fletch Road
Land O Lakes, Florida 34637
www.wexfordpartners.com
p: 312.261.5513

Industry

Management consulting for businesses looking to improve internal and customer-facing operations and overall strategic alignment in varying industries, including:

- Technology
- Financial Services
- Telecommunications
- Banking
- Transportation/Logistics
- Real Estate
- Insurance
 - ✓ Property/Casualty
 - ✓ Life/Health/Disability
 - ✓ Reinsurance

Management Team

Wexford's professionals have decades of combined experience in improving businesses. Each professional has a high level of personal commitment to their work that has recently been lost in today's fast-moving business climate. Along with this commitment comes a strong belief that a consulting firm should share a client's care and concern for their business. Wexford's mission is to work with clients as if Wexford were an integrated part of the client's company.

Strategic Partnerships

Wexford Partners has taken steps to develop and secure strategic partnerships with outside consultancies and independent freelance consultants in specialized topic areas to draw upon as necessary to aid in projects on an as-needed basis. By streamlining our business through these partnerships, Wexford is able to bring the necessary expertise to address your issues in an economical fashion.

Consulting Services

As a full-service consulting firm, Wexford Partners offers the following:

- Operational Change Management

- Project Management & Revitalization
- Improving Customer Profitability
- Business Process Redesign & Implementation
- Process Diagnostic Software and Training
- Executive Coaching and Search
- Distribution Management & Optimization
- Mergers & Acquisitions
 - ✓ Operational Due Diligence Reviews
 - ✓ Post-merger Integration Assistance

Professional Profiles

Bob Schleyer

Bob Schleyer has more than thirty years of management experience in the insurance industry. Previously, Bob was President of United Insurance's Home Service Division, Union National Life Insurance Company, United Casualty Insurance Company, and Union National Fire Insurance Company, and also served as Senior Vice President and board member of United Insurance Company of America. Following his tenure at United Insurance, Bob was a Principal at Charter Consulting for four years. He then founded Wexford Partners and is currently the Managing Partner.



Bob earned his M.B.A. at the University of Chicago in finance and marketing. He is also a Fellow in the Life Management Institute. Bob has been active in numerous insurance industry trade organizations, notably AFA (American Fraternal Alliance) and LIC (Life Insurers Council).

He is also an Associate Consultant with IMERGE Consulting.

Bob and his wife, Betsy, live in Land O Lakes Florida, and are active in a number of charity and community organizations.

Bob can be contacted at bob.schleyer@wexfordpartners.com

Dorothy Kramer-Kawakami



Dorothy provides her clients with a range of resources for organizational growth, including experienced consultants, information, tools and measurement instruments. Dorothy has worked with clients in North America, Europe, and Asia. Her Consulting and program work has included strategic planning, corporate university development and facilitation, market planning and change management consultation. Recent consulting projects have included strategic planning for small to mid-size financial services firms, restructuring of a small insurance company to align with new strategic direction, development of a corporate university and marketing strategy in Asia, and development of cultural assessment process. Dorothy earned her B.A. and M.A. from the University of South Florida. She holds several industry designations, as well as being certified in 360-degree feedback and Myers -Briggs Type Indicator. Dorothy was formally Corporate Vice President of LIMRA International, and head of LIMRA's Leadership Institute. She has worked

in collaboration with the faculties of Babson College, New York University's Stern School and Northwestern's Kellogg Graduate School of Business.

Dorothy resides in Simsbury, CT with her husband Mel.

Dorothy can be contacted at Dorothy.Kramer-Kawakami@wexfordpartners.com.

Don Post

Don has over 30 years' industry experience as a consultant and executive, with a focus during the past ten years' on document management, electronic records compliance, business process management and internet technologies. Previously, he was Senior Manager of Xerox Professional Services, and a Senior Consultant with A.T. Kearney Management Consultants; Was AIIM2005 Conference Chair (program committee 2002-2005); and TAWPI 2006 Conference Chair (program committee 2003-2006). Recognitions include Certified Document Imaging Architech (CDIA+) and TAWPI Information Capture Professional (ICP) certifications; AIIM ERMp and ECMp certificates; and AIIM LIT designation. Don is active in AIIM standards committees for digital archiving, IEEE Mass Storage Systems & Technology Initiatives (MSSTC2010) and the SNIA.org Long Term Preservation Working Group.



Don has been an approved trainer for the AIIM Electronic Records Management (ERM) certificate program, TAWPI ICP and CDIA+. His focus is on industry education, enterprise infrastructure, technologies and policies for assuring excellence in information management and holds a BS in Electrical Engineering from Purdue and an MBA from Bradley.

Don can be contacted at don.post@wexfordpartners.com.

Maria Thomson, FSA, MAAA



Managing Principal, RAD Insurance Holdings, Inc., Maria Thomson, author of *Insurance Coverage for All!...And How Insurers Can Afford to Provide It*, is a leading expert on reducing new business acquisition costs through RAD (Rapid Assessment & Delivery) and leveraged distribution channels, mid-market success strategies and products for the middle market. Previously, she ran reinsurance operations for The Phoenix and successfully negotiated a large capital deal for them. She founded and served as Managing Principal of the management consulting firm, Thomson Management Solutions for 12 years. Prior to that, she was VP & Chief Actuary of Monarch Life.

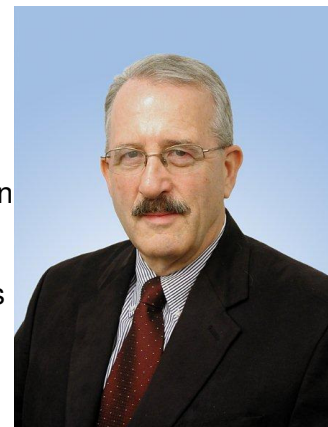
Maria spearheaded the formation of the SOA's Marketing and Distribution Section, is currently on the Section Council and has chaired the Project Oversight Group for a recent SOA study on Automated Underwriting.

Maria can be contacted at maria.thomson@wexfordpartners.com

Bill Weeks, CLU, President of Weeks Consulting Group

Bill Weeks has designed well over 200 sales compensation plans for over 80 different companies in sales and sales management roles ranging from Head of Sales to Recruiter. With over 25 years experience in compensation design, he can help you find the right answer for your business.

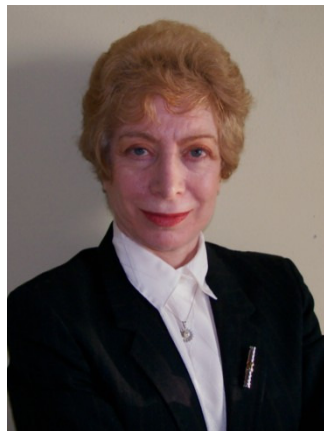
Prior experience includes four years as Vice President of Sales Compensation for Prudential Financial, and over ten years as a Sales Compensation Consultant for LIMRA International. A frequent speaker at professional seminars, and a well published author, Bill Weeks is a leading expert on sales and incentive compensation design. His client list includes insurance companies with all types and sizes of target markets and distribution organizations. He has completed consulting projects with the largest life and multiple line companies as well as some of the smallest fraternal organizations, call centers, and PGA companies.



Merging with or acquiring another company? Nothing makes employees less likely to perform at expected levels than fear for their jobs! How you handle their variable compensation during a time of transition is an important element in how they feel about their new plan or their new organization and how quickly they get back to work. A misstep can easily cost way too much and still be ineffective. Doing it right can gain you loyalty and (higher) productivity for years to come.

Contact Bill at bill.weeks@wexfordpartners.com.

Faye Albert



Faye provides her clients with advice based on actuarial analysis and management experience. She was the Chief Actuary at American Bankers Insurance Group and National Ben Franklin. More recently she has served as a consultant to insurance companies, audit firms and lawyers.

Faye is a Fellow of the Society of Actuaries and received an M.B.A. from the University of Miami. She has been active in the Society of Actuaries, the Conference of Consulting Actuaries and in the American Academy of Actuaries. Recently she was Chairman of the Academy Task Force that developed the 2001 CSO tables used in the United States for life insurance valuation. Currently she is involved with the development of Principles Based Reserve methods.

Faye can be contacted at faye.albert@wexfordpartners.com.

Richard A. "Dick" Adams



Dick has over 30 years experience as an internal and external consultant/facilitator and a start up and rescue executive achieving dramatic results and bottom-line savings, enhanced service delivery and improved quality of life on the job. He has held Director positions at Connecticut General, Cigna, Aetna and Travelers as well as Chief Operating Officer of Applied Professional Systems, a software company. As a facilitator, he has conducted successful engagements in eight countries and in fifteen different industries.

He has a B.A. in Sociology from Ohio Wesleyan University, and, as a Lieutenant Commander (Supply Corps) is a graduate of the US Naval Supply School (Business School) and Trial and Defense College (Justice School), and Principle Centered Leadership at the Covey Leadership Center. He has spoken on process improvement at Duke University, the University of Chile, and the University of Karlstad (Sweden) as well as being published in Connecticut newspapers. He received a Connecticut Quality Award for Innovation in 2003 for the elisit™ product.

Dick and his wife Pat live in the Greater Hartford area, where he has been President of numerous charitable, civic, and church organizations. In his free time he likes to play golf, tennis, downhill ski, and fly stunt kites.

Dick can be contacted at dick.adams@wexfordpartners.com.

Our Philosophy

Wexford Partners was founded on the belief that management consulting is significantly different than other forms of professional services. Management consulting must be a partnership of the client and consultant, with the client's profitable growth as the only measure of success.

We are committed to our business model of providing more senior, experienced consultants, who have deep industry experience. Who have been there and understand your business. At Wexford, we strive to develop long-lasting relationships with a few clients, to form a bond of trust.

Based on this trust we can provide intelligent honest support to the organization and take a long term view of our mutual success.

We are known for our hands-on, roll-up-our-sleeves work ethic, and do not consider our job completed until you do. We work best as trusted advisors sharing in your issues and successes, challenging you to be more competitive and to become a leader in your field.

We are driven by your business potential.



Representative Engagements

Operational Change

- Directed the design of a **change management** program that supported the overall implementation and rollout of new systems and processes.
- **Designed and implemented** a fully-functional Model office pilot environment for validation of systems, processes, training, and management.
- Streamlined the processes and organization of a major financial institution, which resulted in an increased focus on **customer service**, and a 12% improvement in business retention.
- Led a restructuring of a major business unit for a mutual insurer that identified business process improvement opportunities and decreased loss ratios while increasing employee responsibilities.

Project Management and Revitalization

- Developed and implemented a **Program Management Office (PMO)**, including policies; organizational structure; standards and tools; rigorous program planning and tracking processes; detailed work plans with critical path and inter-project dependencies; management controls and board reporting; and issue and risk management procedures.
- Provided project management expertise and business improvement services to a global corporation undertaking a complete replacement of **mission critical business systems** and dramatically improved business operations through process reengineering.
- Examined a global company's **accounting processes** and revenue booking procedures. Created project plans, worked with business unit leaders, then investigated and cleared thousands of outstanding, uncategorized transactions related to a merger in fewer than two months.

Business Process Redesign & Implementation

- Structured and led a process redesign project, including all **product fulfillment operations** and the **call center**. Focused on identifying immediate and longer-term process improvement opportunities, lowering cost and increasing the overall capacity of the organization.
- Led a process redesign for a specialty property insurance company. The project's scope included the underwriting, claim, payment processing, and policy production areas. The projects focused on **increasing customer satisfaction** through improved response to their needs, while seeking **cost containment** strategies. We were also heavily involved in mitigating the change management and organizational structure issues that arose.
- Led a team of 14 client staff in the redesign of a critical transactional business unit for a nationwide financial institution. Identified and implemented processes that **lowered costs and radically improved cycle time** for transaction processes.

Increasing Customer Profitability

- Led an engagement providing support to an eBusiness/CRM initiative of a multi-billion dollar enterprise, with specific focus in the areas of strategic planning, program management, team building, process design, and change management.
- Facilitated the mapping of Key Process Indicators (KPI's) to ongoing projects in support of a customer relationship initiative at a large financial institution. This effort was essential to the prioritization of resources in support of the CRM effort.

Representative Services

As a full-service consulting firm, **Wexford Partners, Inc.** offers your organization the following important differentiating factors:

- Experienced executives who know what you are facing providing actionable consulting services
- Affiliations with some of the country's best specialized consulting firms
- Ability to deliver big firms' skills at client-friendly costs
- Ability to deliver these services through a Women Business Enterprise in Illinois and Indiana.

Operational Change Management

Examples of Past Projects:

- Provided change management for the rollout of new systems and processes
- Designed and implemented a functioning Model Office pilot environment
- Streamlined the process and organization of a major financial institution, which resulted in a 12% improvement in retained business
- Providing thought leadership and national presentations.

In support of our Change Management practice, our partners provide:

- **Analysis of Culture and Implementation of Change**
The CultureFit Diagnosis and Consulting Process yields key insights into your work culture, helping you improve organizational effectiveness, achieve strategic objectives, and attain meaningful, sustainable change. The analysis process is web-accessed, confidential for staff participants, and customizable to reflect your own language and processes.
- **Myers-Briggs Type Indicator (MBTI)**
The *Myers-Briggs Type Indicator®* (MBTI®) instrument provides insight into individual ways of interacting, observing, communicating, decision making, and functioning in work and personal environments. It is a well documented and constantly validated tool for personal understanding and development. It is a valuable tool in implementing strategic planning processes, change management, team development, and leadership growth.

Business Process Redesign & Implementation

Examples of Past Projects:

- Structure and implement process redesign projects involving customer fulfillment and call centers
- Designed the process analysis of an electronic funds transaction function, resulting in recommendation reducing errors and costs.
- Redesigned the operational processes for a specialty insurance company
- In support of our process redesign practice, our partners provide in-depth consulting in document and knowledge management:

We know business processes, best practices, and technology applications from a broad range of experience and applications. We specialize in:

- Imaging and Document Management
- Workflow and Process Systems
- Enterprise Report Management
- Forms Processing
- Portals and Web Self-Service
- Collaborative Systems
- Records Management
- Content Management
- Digital Signatures and PKI

And, unlike vendors and integrators who must sell particular products, we are unbiased in finding the best solutions to match **your** unique requirements.

Project Management & Revitalization

Examples of Past Projects:

- Develop and implement Program Management Office
- Provide project management expertise to a firm replacing mission-critical systems
- Design and prepare program level budgets and analyses

Improving Customer Profitability

Examples of Past Projects

- Support eBusiness/CRM efforts
- Facilitate the development of KPI supporting customer satisfaction
- Establish procedure and process for customers' service functions, reducing the cost of inquiries and legal expenses

Process Diagnostic Software and Training

Our *elisit*TM process is a simple, yet sophisticated, web-based business diagnostic tool to help you consistently discover and quantify the opportunities in your organization. Powerful and actionable information, customized for your operation and expressed in real dollars, is elicited directly from your employees via an interactive internet experience. From project start to delivery, *elisit*'stm robust, real-time reporting is measured in days, not months.

Mergers & Acquisitions

- Operational Due Diligence Reviews
- Corporate Culture and Leadership Assessment
- Post-merger Integration Assistance
Company survival evaluations

Distribution Management & Optimization

We will partner with your company, helping you define your marketing and distribution strategy, and creating a tactical blueprint you will need to execute it. These services are provided in conjunction with our strategic partner an international marketing and research organization.

- Compensation System Design
- Benchmarking
- Χομπενσαπιον Μοδελινγ Σερβιχεσ
- Distribution Pro-Forma
- Distribution Workshops
- Strategic Planning
- Tactical Planning
- "On Demand" Client Intelligence
- Call Center Transformation Consulting.