

OptimaAlliance

The Business Advisers Alliance
in the South West & South Wales

PRACTICAL SERVICES FOR BUSINESS DIRECTORS

About Us

We help business owners achieve their goals. Whether it's boosting profits, increasing sales and marketing, streamlining operations, installing Quality or IT systems, raising finance, planning and implementing an exit strategy, or helping with any other difficult business problem.

All of our Advisers are seasoned and mature business professionals with decades of experience, most often at the board or director level of major companies.

They are well trained in working with business owners and take a highly practical approach to solving problems and enhancing your business, working closely with you at each step of the way.

Because of our low overheads and efficient network structure we can offer services at only a fraction of the cost of the big consultancy companies.

***We provide practical,
expert advice with
"hands on" implementation
at a cost that small businesses
can afford***

Our Services

We are truly in the business of helping business owners to achieve their goals. Typically, we start with services that address the most difficult problems facing the business, and then, over time, as these problems are solved, new business goals are set and different services are required.

***We believe . . .
actions speak louder
than words!***

The most common services we provide are those that help to increase sales, reduce costs, implement quality systems, improve marketing through web sites, brochures and targeted campaigns, select and implement IT systems, finance expansion, comply with health and safety regulations and arrange sale of company.

The list on this page is by no means comprehensive. It is only provided to give an indication of the extent and depth of our capabilities to help business owners.

All of our services are carefully tailored for each client's business and fit into an agreed strategy for achieving each business owner's goals.

- Accounting Systems
- Administration Systems
- Advertisements
- Bad Debt Collection
- Brochures
- Business Plans
- Cash Flow Management
- Company Rescue Strategies
- Company Valuations
- Cost Reduction
- Credit Control
- Credit Risk Alerts
- Customer Incentive Schemes
- Direct Mail Databases
- eCommerce Sites
- Employee Incentive Schemes
- Expansion Planning
- Export Strategies
- Foreign Exchange
- Franchising
- Grant Searches & Applications
- Health & Safety
- Human Resources
- Industrial Relations
- Insurances
- Interim Management
- International Trading
- Investors In People
- ISO 9000 /14000
- IT Selection & Implementation
- Loans / Financial Re-Structuring
- Logistics Planning
- Managing Overseas Partners
- Market Research
- Marketing Lists
- Marketing Plans
- Mergers, Acquisitions & Disposals
- New Business Strategies
- New Company Establishment
- No Win No Fee Legal Services Arrangement
- Pension Planning
- Production Studies
- Project Management
- Public Relations
- Purchasing
- Sale of Company
- Sales Coaching
- Sales Training
- Security
- Seminars & Exhibitions
- Staff Development
- Succession Planning
- Taxation Minimisation
- Total Quality Management
- Training
- Trouble Shooting
- Venture / Angel Capital Arrangement
- Web Sites
- and many others . . .

www.optima-alliance.co.uk

**Bath • Bristol • Cardiff • Cheltenham • Chepstow • Chippenham • Cirencester • Exeter
Gloucester • Llandoverly • Marlborough • Newport • Pontypool • Swindon • Yeovil • Usk • Wincanton**

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Roddy Ando **Accountancy & Tax**
Accounting and tax. Installation and monitoring of accounting systems. Developing applications from Microsoft Office applications, Excel and Access for management accounting and information provision. Mapping applications for internal control reviews. Tax planning for the family business.



Malcolm Bentley **General Management, M&A**
Business Management, Strategic Planning, Financial Planning & Budgeting, Cash Flow Forecasts, Buying & Selling Businesses, MBOs, Business & Management Integration, Change Management, Project Management, Business Valuations, Developing Teams & Risk Analysis.



George Bullivant **Change Management**
General sleeves-rolled-up management advice (no reports) for companies £0.5M - £10M. Developing useful management information to guide decisions and build bank confidence. Building management teams, improving staff relations and performance.



Martin Carter **Quality**
ISO9000, ISO14000, ISO1779, BS7858, BS7499 and ISO/TS16949. Design, development and implementation of quality, environmental, information and manned security management systems.



John Cheal **Manufacturing**
Interim management, Production management, Lean Manufacturing, Production Planning & Control, Logistics, Manufacturing Systems, Project Management, Manufacturing Strategy, Purchasing & Procurement, Inventory Control.



Harry Childs **Sales & Public Relations**
Sales, Sales Training, Sales Management, Sales Coaching, Sales Scripts (telephone and field), Sales Presenter Design, Sales Literature Design, Sales Literature writing and editing, Web Site text writing, Advertising Design, Writing Press Releases.



Andy Christie **Sales Generation**
Sales growth. Sales planning and implementation. New customer acquisition. Business expansion. Preparation for sale/exit. Business turnaround.



Kurt Christopherson **Marketing**
Market Planning, Business Development, Business Strategy, IT, Websites, eCommerce, eBusiness, Marketing Communications, Brochures, Adverts, Public Relations, Product Development, Public Speaking (*also registered professional QuickBooks accounting software adviser*).



Frank Colam **General Management**
Proven track record of enhancing profits & growth by developing winning product /marketing strategies and by attracting /retaining customers. Proud to have established myself as a successful operations director. Combining expertise in P&L management & strategic planning.



Dave Crisp **Coaching & Utilities**
Executive Coaching · Business Analysis & problem solving skills · Project Management skills · Change Management · Utility & Environmental Solutions



John Dabbs **Business Development**
BDM Client Partnership through its partner network can provide marketing agency services including winning profitable new customers, market research, business analysis, marketing communications, Public Relations, design and build of website and e-commerce solutions.



Richard Davis **Change Management**
Facilitation, Strategy, Communication, Goal-setting, Organisational Design, Benchmarking, Project and Programme Management, Business Process Design, Improvement and Control, Defence Procurement.



Geoff Dimmock **Health & Safety**
Advice & assistance with the Management of Health & Safety including Audits, Policy Statements, Risk Assessment, C.O.S.H.H. Assessments, Manual Handling Assessment, Fire Risk Assessment, Display Screen Assessment, Provision of Emergency Procedures & Training.



Allan Edwards **General Business & I.T.**
Practical advice on getting the best out of I.T. in small and medium sized businesses. Investigating requirements, proposing a solution and then carrying out the implementation, training and on-going support.



Roger Empson **Telecommunications**
Telecommunications - least cost supplier selection.



Mike Gould **Sales & Marketing**
Mike Gould has spent the last 38 years creating, building and then successfully selling small and medium sized businesses. He has created and sold 4 of these ranging from a contract cleaning company, to a small chain of hotels.



Richard Harrison **Business Management**
Business Strategy & Planning, Change Management, Creative Problem Solving & Facilitation, Operations Management, Customer Service, Performance Improvement, IT Network Design & Implementation, IT Policies & Security, Developing Lean Approaches in Service Organisations.



Ian Heard **Business Strategy**
Business strategy and planning, general management, equity and debt finance, business recovery, financial analysis, change management, communication, people management and team building.



Graham Hodges **Business Turnaround**
General business trouble-shooting, Operational P&L management, Business profitability turnaround, Organisational restructuring, negotiation of outsourcing contracts, service transition, new contract delivery, Business Rates rate relief and general management advice.



Roger Holland **Business Support & Dev.**
 People Management, Debt collection and working capital improvement, Customer Management in personal, business and commercial sectors, Human Resources operations management, Project and programme directorship - CRM, Universal Bank, Branch mergers.



Malcolm Randall **Property Consultant**
 Specific abilities in acquisition, leasehold and freehold negotiations, planning applications, building regulations, structural and architectural design, project management, construction, financial control, security and health and safety law. General skills in business management at board level.



Richard Howard **General Management**
 Broad general management experience. Business Development, Marketing, Business and Sales Strategy, Business Planning, Internal and External Communications, Staff Retention, Business Analysis. A keen understanding of SME dynamics.



James Roe **Risk Management**
 All aspects of International Trade (Export & Import) Currency Risk Management specialist. Cross-cultural management skills.



Bob Keightley **IT & General Management**
 IT strategy, analysis of business systems requirements, implementation of IT systems, database systems development, expert use of Microsoft Office. Provision of IT training services. General small company management, recruitment, exit strategies, preparing companies for sale.



Andrea Steel **Executive Coaching**
 Business Coaching · Committed & focused professional manager · Analytical, problem solving skills · Organisational skills · Experienced in managing accounts · Excellent skills in initiating and developing long term client relationships · Successful trainer of staff at all levels.



Conrad Lohr **Financial Management, ROI**
 Financial Management, Working Capital Management, Gross Margin Improvement, Overhead Cost Reduction, Net Margin Improvement, ROI Improvement, Cashflow Planning & Control, Interim Financial Management, Interim Financial Director, Strategic Planning, Business Planning.



Peter Stewart **Change Management**
 Change Management & Management Control, Process Improvement & Implementation, Management Information & Analysis, Management Reporting Systems, Multidisciplinary & Multinational Product Development Project & Programme Management.



Declan Lynch **Human Resource Management**
 Human Resource Policy & Strategy, Recruitment & Selection, Management Development, Training Needs Analysis, Investors in People, Employee Participation & Involvement Strategies, Performance Management & Appraisal Processes, Employment Law, Employment Contracts.



Ian Thomas **Business Development**
 B2B Marketing, Supply Chain Management, Strategy Development and Implementation, Change Management, Programme Management, Project Management, Structural Integration, Cost to serve analysis, Business start up and Turnaround.



John Marsh **Strategic Planning**
 Strategic planning, Operational planning, Programme Management, Project Management, Defence Acquisition and Procurement in particular a detailed understanding of the Ministry of Defence's processes and procedures, Security, Risk Management, Drafting Business Cases and Goal setting.



Steve Turner **Manufacturing**
 An experienced manager and consultant with a track record of delivering enhanced results by improving performance and reducing costs.



Chris Olchawski **General Management**
 Truly experienced General Manager with wide experience of profit orientated business and not for profit organisations, usually developing a business strategy and implementing it. Good analytical skills. Good track record of people development. Enthusiastic!



Angus Wans **Human Resources**
 All aspects of Human Resource & Personnel Management, Recruitment, Appraisal, Training & Development, Employment Contracts and their variance, Employment Terms & Conditions, Industrial & Employee Relations, Redundancy Handling & Administration, Health & Safety.



Glenn Pearson **Business Development**
 General and Operational management for SME and Multi-Nationals. Business Development and Strategy: Change management; Financial and Budget Planning; Company Restructuring; Quality monitoring Programmes. Development of Sales & Marketing Programmes to improve market share.



Mark Yates **General Management**
 General "hands on" management advice, Interim Management, Project Management, Document Scanning, Storage and Conversion to/from Microfilm Solutions, Process Improvement, Strategic Planning, Construction Project Management, Business Coaching & Mentoring.



Derek Price **General Business Advice**
 Information Technology, Businesses Management, Financial & Operational Administration, IT Business Solutions (analyse, design, improve, train and implement), CRM, Proof of Delivery, Project Management, Event Organisation.

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