



# GUIDANCE BEYOND the next HORIZON



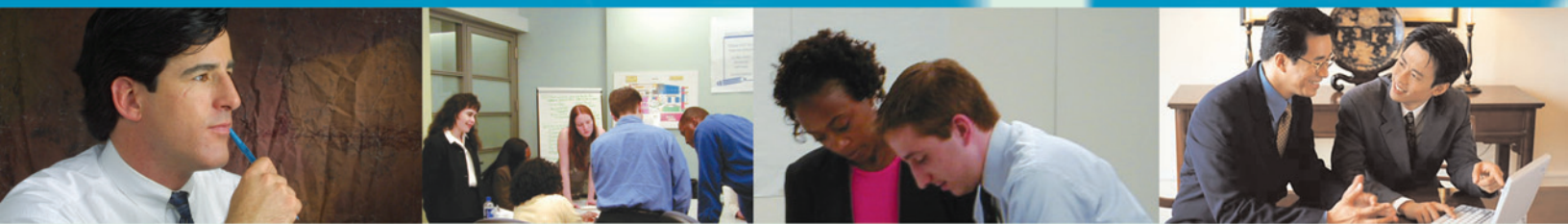
LINKING PEOPLE MANAGEMENT WITH BUSINESS STRATEGY

Team Facilitation, Strategic Planning, Talent Development,  
Performance Management, Human Interactions, Change  
Integration, Communication Strategies, Team Building,  
Leadership Development, Organization Development



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Welcome

**AIM Strategies®, Applied Innovative Management®, is a people strategy firm specializing in developing better leaders.**

"I started AIM because I profoundly believe in the capability of people to affect change," says CEO Yael Sara Zofi. Drawing from an active network of 50+ consultants and a core team of associates, facilitators and team specialists, Zofi is proud of the range of expertise that AIM has put in place to deliver the high quality that defines the firm.

AIM Strategies® is not only our brand, it is also our business proposition - to bring *applied innovative management strategies* to your priorities. Our boutique practice focuses on the four key areas that denote organizational excellence:

- **Leadership Development**
- **Team Facilitation**
- **Talent Retention**
- **Performance Management**



Our process is dynamic. Each project begins with a holistic diagnostic review and proceeds with appropriate assessments, tools, methods and activities. Outcomes are scoped within the context of the people challenge and results are integrated into the business culture.



# OUR BUSINESS PROPOSITION

“ We know that discovering the right strategy is not the ultimate goal; the ultimate goal is to achieve a competitive advantage by putting the strategy into practice and link people with business results. ”

## AIM VISION

To develop leaders who successfully apply innovative management techniques to today's evolving business opportunities.

## AIM MISSION

To help clients build effective leadership capabilities to achieve superior business performance. We do this by customizing people management solutions - practical consulting, innovative training, and hands-on coaching - to align with the client's business strategy. This raises the organization's IQ, helping leaders develop people with the exceptional skills necessary to outpace their competitors.

## AIM APPROACH

Our business approach is based on a three-fold foundation:

- Understanding the client's business.
- Listening carefully and customizing accordingly.
- Delivering an experience of exceptional quality.

## AIM STRATEGY

### Big Firm Experience

We bring Big-5 Consulting and Fortune-500 Corporate experiences to small, mid-size, and large firms tailored to what makes sense for the organization to stay innovative and competitive in the marketplace.

## Tailored to Your Needs

We develop strategies appropriate to the specific needs and characteristics of your team. We do not offer "canned" programs. Each effort is customized to your organization.

## Expertise From the Expert

Our Strategy is to always deal directly with the decision-maker. Direct access to AIM leadership provides clear communication between your team and ours.

## Big Picture and Details

We combine Organizational Development (big picture) techniques with Training (team effectiveness) and Coaching (individual development) perspectives.

## Global Perspective

AIM team members have a dynamic collection of global experience in the US, Canada, Europe, Asia and Latin America.

## Team Techniques

Our tools and techniques enable teams to achieve peak performance. We offer contemporary problem-solving insights and team facilitation events.

## Business Partnerships

AIM maintains an active network of consultants and associates. We partner with experts on projects, depending on your needs. In addition, we collaborate around your business strategy. We will ensure that our professional service always exceeds your expectations.

# OUR GUIDING PRINCIPLES

“Our innovative people strategies - practical consulting, interactive training and hands-on coaching - help leaders drive business results.”

## AIM PHILOSOPHY

### We believe...

...that people already have what it takes to be successful. Our job is to help them gain awareness of where they are and guide them to get to their destination.

...in listening to our clients because we understand that while we are the management development professionals, they are the business experts.

...in presenting clients with an integrated offering. We deliver a complete design package, the signature of AIM's service commitment. We avoid the "flavor of the month" trap. Each engagement grows out of a specific business challenge and each initiative is tailored to your unique needs.

...that organizational development has an impact on productivity, morale and excellence. We are committed to attaining business results, and we'll help you figure out how to measure them.

## AIM VALUES

PEOPLE are at the heart of our work.

**P**actical solutions

**E**mphasis on innovation

**O**pen dialogue about possibilities

**P**assion for improving human interactions

**L**isten closely to the client

**E**xceptional commitment to quality service

## AIM DIFFERENCE

According to our clients, we offer a different consulting experience, and we are pleased to quote a few of them...

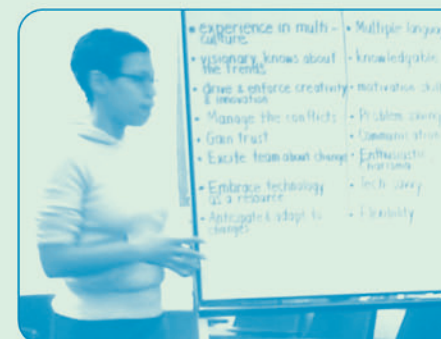
*"AIM makes a personal commitment, manages relationships well, and also provides ideas outside the scope of the project."*

*"[The AIM] work ethic is to focus on getting the end product the best way it can be, and in the absence of details, AIM always has a contingency plan and goes the extra mile."*

*"AIM brings a humanistic approach - presented in a very simple and practical way which has a 'user-friendly' approach feel to it."*

*"AIM's style is to really listen. They don't try to sell a product or just make it fit. Instead, they ask probing questions and propose a solution offering a toolset for different sets of circumstances."*

*"The Biggest thing AIM brings is a toolkit - different, assessments, different approaches - to the same set of challenges that individuals, teams and organizations face."*





# OUR SERVICES

## CONSULTING

We apply effective organizational development techniques by combining practical business expertise with sound people strategies. We focus on leadership, management and performance to align talent with new directions.

Our AIM is to **link** people management issues to your business strategy.

## TRAINING

Our learning practice focuses on building effective people skills, e.g., influence, problem solving, feedback, and general leadership and management practices. We tailor each session to the particular needs of the business, team and organization.

Our AIM is to **build** your performance culture through increasing knowledge, skills and abilities.

## COACHING

We provide leadership coaching that combines current innovative thinking with classic competency models. We gather performance data, establish a climate that fosters communication, provide feedback and help executives set and achieve goals.

Our AIM is to **create** a positive one-on-one relationship and help individuals become more successful.

## Dynamic Facilitation...

*"AIM Strategies has a deep understanding of leadership, business strategy, and people. They designed our offsite/teambuilding session with lots of flexibility and creativity. Our team communications drastically improved as a result. I appreciate all of the dedication and commitment to quality that you have demonstrated in our projects, and I look forward to a long and mutually satisfying relationship."*

Senior Director, Pfizer



# MENU OF AIM OFFERINGS

## ORGANIZATION DEVELOPMENT

### Strategic Planning

STRATEGY FORMULATION AND IMPLEMENTATION

### Talent Retention

ENHANCING THE TALENT PIPELINE

### Offsites/Retreats

HUMAN INTERACTIONS AND LEADER EFFECTIVENESS

### Organizational Transformation

EASING TRANSITIONS WITH AN IMPLEMENTATION MODEL

### Post-Merger Integration

SYNTHESIZING NEWLY FORMED TEAMS

## LEADERSHIP DEVELOPMENT \*

### Agent of Connection™ i

21ST CENTURY LEADER BEHAVIOR SERIES

### Moving Up™

TRANSITIONING FROM STAFF MEMBER TO TEAM LEADER

### In The Lead™

LEADERSHIP STYLES (MBTI AND OTHER ASSESSMENTS)

### The Leadership Challenge™

RESULTS-BASED LEADERSHIP EFFECTIVENESS

### Leading People Advantage™

DEVELOPING DIRECT REPORTS

### Leading Teams Advantage™

BUILDING EFFECTIVE TEAMS

### Driving Change™

BUSINESS TRANSFORMATIONS

## PERFORMANCE MANAGEMENT \*

### ABCs of Performance Management™

CREATING A PERFORMANCE MANAGEMENT CULTURE

### Accelerated Performance Management™

IMPLEMENTING PERFORMANCE TECHNIQUES

### Advanced Performance Management™

STRATEGIC PERFORMANCE AND DEVELOPMENT

### Management Essentials

EFFECTIVE MANAGEMENT TECHNIQUES

### Managing for Results

PRODUCTIVE MANAGEMENT SKILLS

## TEAM FACILITATION i

### Fast Start™

NEW MANAGER ASSIMILATION

### Team Launch™

TEAMBUILDING FOR NEWLY FORMED TEAMS

### Driving Team Vision

TEAM GOAL SETTING

### Team Fitness™

TEAM PRODUCTIVITY EXERCISE

### Set In Motion™

ALIGNING TEAM ROLES AND RESPONSIBILITIES

### Forward Motion™

ENABLING DEVELOPMENT OF 'A' TEAM PLAYERS

### Future Search

TRANSFORMATIONAL PLANNING MEETING FOR LARGE GROUPS

### Open Space Technology

SELF ORGANIZING STRATEGY FOR LARGE MEETINGS

### Fast Growth™

TEAM DEVELOPMENT ACCELERATION

### Team Checkup™

CUSTOMIZED INTERIM TEAM DEVELOPMENT ACTIVITIES

### Team Talk™

EFFECTIVE TEAM COMMUNICATION AND DECISION-MAKING

### Team Insight\*

TEAM STYLES INCORPORATING MBTI, TEAM PLAYER TYPE AND OTHER INTERPERSONAL INSTRUMENTS AND INTERACTIVE TEAM ACTIVITIES

### Team Impact™

INCREASING TEAMWORK CAPACITY, ACCOUNTABILITY AND SUPPORT

### Refueling The Team

REENERGING TEAM COMMITMENT AND KEEPING TEAMS ON COURSE

## GROUP COACHING

### ACT™ Coaching i

ASSESS, COACH AND TRANSFORM

### ACT™ and Respond i

PEER AND 360° FEEDBACK, INCLUDING TEAM COMPOSITE

### Coaching Conversations for Results i\*

POWERFUL "HOW TO" METHOD FOR FOCUSED CONVERSATIONS

### Executive Excellence™

SENIOR LEVEL DEVELOPMENT - FEEDBACK AND COACHING

i AIM designed special customized series

\* These initiatives can also be presented in workshop format

GUIDANCE  BEYOND  
the next HORIZON

“ Working with the client, **AIM** customizes tools and activities to achieve a successful outcome. ”

## ASSESSMENTS

- Team Temperature Scorecard** ⓘ  
ASSESS TEAM EFFECTIVENESS PROCESS AND STRATEGY
- Team Player Type**  
COLLABORATOR, CONTRIBUTOR, CHALLENGER, COMMUNICATOR
- Social Styles Interpersonal Profile**  
SELF/OTHER COMMUNICATION SKILLS
- Networking Styles Survey** ⓘ  
IDENTIFY NETWORKING STYLES
- Listening Inventory** ⓘ  
GUIDE TO RAISE YOUR LISTENING IQ
- Change Readiness Assessment** ⓘ  
ASSESS STAKEHOLDER COMMITMENT
- Consulting Skills Inventory** ⓘ  
ENGAGE, CONTRACT, DIAGNOSE, IMPLEMENT, EVALUATE
- Trust and Credibility Review** ⓘ  
EXAMINE INFLUENCE, POWER AND BUSINESS RELATIONSHIPS
- Myers-Briggs Type Indicator**®  
MBTI PERSONALITY TYPE
- Thomas-Kilmann**®  
CONFLICT RESOLUTION INSTRUMENT
- FIRO-B**®  
FUNDAMENTAL INTERPERSONAL RELATIONS ORIENTATION BEHAVIOR
- FORTE**®  
COMMUNICATION TOOL FOR TEAMS AND ORGANIZATIONS
- 360° Feedback**  
CCL BENCHMARKS®, CLARK WILSON, ERC, GILLMAN INSTRUMENTS

## SIMULATIONS

- The Mobius Twist**™  
MERGER SIMULATION
- Cart - O - Cation**™  
JIGSAW PUZZLE BASED TEAM PROBLEM SOLVING
- The Elephant Game**  
TEAM COLLABORATION AROUND ORGANIZATIONAL CHALLENGES
- Great Human Interactions**  
EXPLORE BUSINESS INTERACTIONS THROUGH LIVE SCENARIOS
- NetLinking**™  
SITUATIONS PROMOTING KNOWLEDGE SHARING AND PROBLEM SOLVING
- Follow the Networking Road**™  
TEAMS COMPETE AROUND BEST NETWORKING STRATEGIES

## TOOLKITS

- Team Fitness**™ Toolkit  
TO BOOST TEAM PERFORMANCE
- New Leader Toolkit**™  
SOLUTIONS FOR NEW AND TRANSITIONING LEADERS
- LEaDS**™ Toolkit  
LEADERSHIP, EDUCATION AND DEVELOPMENT SOLUTIONS
- Organization Change Toolkit**  
TECHNIQUES FOR VISIONING, VALUE CHAIN ANALYSIS, PROCESS MAPPING, STRUCTURED INTERVIEWING, IMPACT ASSESSMENT AND ACTION PLANNING
- Performance Management Toolkit**  
ALL INCLUSIVE RESOURCE - FROM GOAL SETTING AND FEEDBACK THROUGH WRITING AND COMMUNICATING EFFECTIVE PERFORMANCE APPRAISALS

## WORKSHOPS

- Business Communications** ⓘ
- Collaborating for Successful Change** ⓘ
- Collaborative Connections** ⓘ
- Conflict Resolution Skills**
- Creative Thinking Techniques**
- Cross-Cultural Interactions**
- Development Discussions**
- Dynamic Decisions**™
- FeedBack to FeedForward**™ ⓘ
- Interpersonal Skills**
- Interviewing Skills**
- Leadership and Management Skills** ⓘ
- Leading Virtual Teams**
- Managing and Leading Diverse Teams** ⓘ
- Managing Change**
- Managing Client Relations**
- Managing Transitions**
- Managing Up** ⓘ
- Meeting Fitness**™
- Performance Discussions**
- Problem Solving**
- Setting SMART Objectives** ⓘ
- Top Talent Conversations**™ ⓘ
- Writing Performance Messages** ⓘ
- Working / Succeeding in Teams**™ ⓘ
- Work / Grow Your Network**™ ⓘ

For more information and samples, contact AIM Strategies@718.832.6767



# AIM

## CLIENT PORTFOLIO

“AIM Strategies® works with a variety of organizations enhancing their leadership and team effectiveness in the face of competitive business challenges. Our senior consultants are accessible, flexible and devoted to our clients' success.”

### INDUSTRIES:

We focus primarily on these industries:

#### Financial

Banking  
Insurance

#### Health Care

Medical Services  
Medical Facilities

#### Pharmaceutical

Biotech

In addition, we have worked with these industries:

Consumer Products  
Entertainment  
Education  
High Tech  
Manufacturing  
Media  
Non-Profit  
Telecom  
Utilities

### FUNCTIONS / DIVISIONS:

We work across all functions, globally, within teams, across departments - all in concert:

Accounting Services  
Aviation / Flight Services  
Corporate Finance  
Customer Service  
Client Relations  
Help Desk  
Information Technology  
Quality Assurance  
Legal  
Manufacturing  
Private Client Groups  
Product Support  
R & D  
Sales Leadership  
Shared Services  
Tax  
Transportation  
Treasury

### SELECTED CLIENT LIST:

AIG  
AT&T  
Chase  
Chipcom  
Chubb  
Cigna U.S. Healthcare  
Clifford Chance  
Con Edison  
Credit Suisse First Boston  
Crum & Foster Insurance  
Deutsche Bank  
DialAmerica Marketing  
Dynetrix Corporation  
Elscent Medical Imaging  
Ford Motors Company  
General Electric  
Goldman Sachs  
Heat Tech  
Himont Chemicals  
HSBC  
JCC of West Orange  
JPMorgan Chase & Co.  
JPM Fleming Securities  
Junior Achievement  
Ken's Marine Service  
M & T Bank  
Marsh & McLennan  
MetLife  
National Academy of Elder Law Attorneys  
New York Blood Center  
The New York Times  
New York University  
NPD Group  
Pepsi-Cola  
Pfizer  
Pharmacia  
Price Waterhouse  
Reliance National  
RiskMetrics Group  
St. Peters Medical Center  
Scudder Kemper  
Ship to Shore Repairs  
SG Cowen Securities  
Smile Align  
Société Générale  
Southland Corporation  
Star Media  
State Street Research  
Viacom  
Virtual Communities  
Vista Computers  
Volvo GM Heavy Truck  
Warner Lambert



# REPRESENTATIVE ASSIGNMENTS



## CULTURE REALIGNMENT



### ISSUE:

Operations division of a financial services firm needed to change to meet the needs of the business. Historically, the operations area had a strong hierarchical culture that emphasized individual contributions. The leader recognized the need to shift the culture to a more focused, action-oriented platform.

### ACTION:

Leader began a process of re-engaging his Division Managers to respond to internal pressures and external market forces through a series of team interventions. AIM Strategies® was brought in to help him build a strong leadership team. Interventions included: strategic planning sessions, retreats designed to explore team decision making, problem solving and conflict resolution strategies. AIM Strategies® coached the client and his senior managers to develop and implement 90-day action plans to change their work groups worldwide in several areas: people, structure, communication and planning. AIM provided tools/techniques which have become the basis for how the division manages people, measures results and coordinates global communication across virtual teams.

### RESULTS:

New processes resulted in over \$9 million in savings and revenue. A global management tool was created and integrated into the organization; several years later it remains the organization standard.

## TALENT RETENTION



### ISSUE:

A major pharmaceutical firm experienced a gap in management talent due to significant growth through merger/acquisition in tandem with the simultaneous retirement of top managers.

### ACTION:

AIM helped design a talent review and development planning process that builds on newly acquired capabilities and prepares executives for successful development discussions. Executive retreats, meetings and training sessions were held across global business units.

### RESULTS:

The organization became better positioned to attract and retain critical talent. Several key directors were promoted and assumed greater responsibilities. An ongoing process was put in place to manage the talent pipeline.

## TEAM FACILITATION



### ISSUE:

Organizational changes created the need to reorganize the senior management team. An influx of new leaders required team alignment.

### ACTION:

AIM conducted assessment sessions with executive teams to determine organization culture and role clarification. This led to designing and delivering leadership training, facilitating feedback sessions, and developing action plans. AIM consultants facilitated several team offsites focused on creating high performance standards, supporting teamwork and cascading these outcomes across the organization.

### RESULTS:

Teams reported increased collaboration and cross-communication during follow-up survey and focus group sessions. Greater role clarity was created, stronger team environment was built and several employee communication initiatives were implemented.

## PERFORMANCE MANAGEMENT



### ISSUE:

Client rolled out a performance management (PM) system that did not function efficiently. Managers were not brought into the process, did not practice effective PM techniques and resisted this change.

### ACTION:

AIM created an inclusive four-step process to ensure buy-in and build a PM culture. AIM designed an open-ended questionnaire to address needs, interviewed one-third (400 people) of senior managers globally and conducted focus groups with various global business areas. After analyzing results by themes, a business case was created around building a PM culture.

### RESULTS:

Senior management instituted a global PM strategy that factored in differences in individual business units. The PM process and relevant materials were redesigned. PM programs were customized and technology-based tools were utilized to create efficiencies.

# OUR METHODS

LINE OF BUSINESS:

## CONSULTING

### FOCUS™ Model

The focus of every consulting engagement is linked to your business strategy. With the FOCUS™ Model, we examine the various factors of your organization's people management approach so that we can deliver actionable results. In the discovery process, we determine how effectively a client's recruitment, training, retention and development strategies drive business growth.

We offer integrated solutions that build on and strengthen human capital - from selection efforts to training modules, talent retention to development, and above all, a strong focus on effective tools and techniques to develop future leaders.



LINE OF BUSINESS:

## TRAINING

### 5-D's™ Training Approach

The hallmark of AIM's training practice is a hands-on deliverable, exemplified by the 5 D's™ Training Approach, which builds a feedback loop into all five phases (**Define, Design, Develop, Deliver, Debrief**).

We work closely with management to determine the best learning approach, and then design and deliver the most effective tools to maximize learning. Event delivery, the cornerstone of the engagement, is an interactive program customized for the client, based on learning objectives and unique needs.

The AIM consultant communicates closely with the client during each phase, to ensure the project is on target.

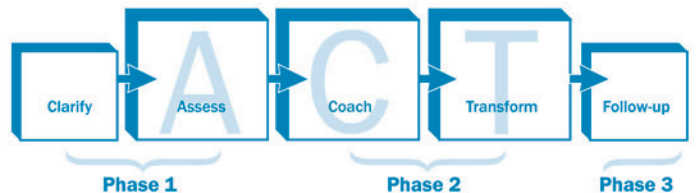
LINE OF BUSINESS:

## COACHING

### ACT™ Coaching Model

Coaching provides guidance to individuals during pivotal points in their careers. The goal of an engagement is to achieve behaviors that result in career success. The ACT™ Coaching Model (Assess, Coach, Transform) accelerates leadership effectiveness and enhances development.

Together, individual and coach work through three phases of the Model. In Phase 1 behavior and communication modes are assessed. An action plan is created, focusing on specific changes, how to achieve them and how to measure results. Phase 2 is the active coaching phase, with multi-faceted tools, techniques and resources provided. A long-term development plan is devised, emphasizing ways to achieve sustainable results. The follow-up mechanism built into Phase 3 ensures that targeted changes are achieved and acknowledged.



# OUR CEO



Yael Sara Zofi

Founder and CEO of AIM STRATEGIES®  
APPLIED INNOVATIVE MANAGEMENT®

Yael Zofi has applied behavioral science techniques to businesses and organizations since 1987 and has dedicated her efforts to developing better leaders. She specializes in leadership development, team facilitation, performance management and group coaching. Ms Zofi prefers an action/experiential model that is highly interactive, addresses current business issues and makes learning practical and enjoyable. She uses contemporary innovative approaches and considers each client relationship a unique partnership.

Throughout her career, Ms. Zofi worked with global clients in the financial services, consumer health and pharmaceutical industries to improve performance through organizational alignment. This included focusing on change management initiatives at all levels. She created team-based tools and developed leadership effectiveness programs. In addition, Ms. Zofi designed and implemented recruiting, retention and training programs. Prior to establishing AIM in 1998, Ms. Zofi was the Vice President of Performance Management, Leadership and Organizational Development for J.P. Morgan. She also spent several years with Andersen Consulting (Accenture) and Price Waterhouse Coopers, specializing in organizational alignment and culture change.

A frequent presenter, Yael Zofi has been a guest speaker at conferences, professional organizations and board groups. She has also published several papers on leadership and change and has presented and written on *21st Century Leadership, Agent of Connection™*. Active in her community, Ms. Zofi led the Chamber of Commerce Business Roundtable and ran leadership workshops for international students. As a Professor at New York University, Ms. Zofi designed and taught three courses: *Leadership and Business Transformation, Leadership and Management Skills, and Management Principles and Ethical Practices* to professionals and MA/MBA students (1995-2003). She serves on the Organizational Development Network

Advisory Board and is former Program Committee Chair. Yael Zofi received her Masters Degree in Organizational Development from Columbia University and her Business Management Degree from Rutgers University.

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