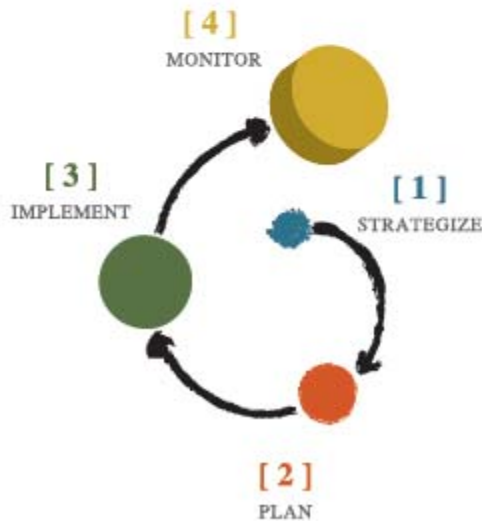


# OUR UNIQUE PROCESS FOR YOUR CUSTOMIZED SOLUTIONS.

At Simons Bitzer & Associates, we take a unique and specific approach to all the services we provide whether it's an entire strategic business process or a personal tax planning project. Our approach consists of four important steps: Strategize, Plan, Implement and Monitor ("SPIM")™. Using this approach, we are able to ensure that the services provided are precisely as intended with the results achieved in a timely manner and according to plan. We also monitor the progress to determine the success of each action taken.

This approach is designed to improve the processes and profitability of a business and to help ensure personal financial goals are achieved.

At Simons Bitzer, we're passionate about your success.



## 1 Strategize

Strategy is step one of our unique process. Before we take on any project, we create a vision of the final result. We meet with our customers to precisely determine what their vision is, what results they would like to see and when they would like the project completed. This is essential for any project large or small.

## 2 Plan

Planning is step two in achieving your vision. After a strategy is determined, a plan is put together to define how the project will be completed. Our planning process consists of developing each project step in detail, identifying who is responsible for completing each step and assigning completion dates. This ensures that the entire project is completed within the plan and keeps resources focused on the result.

## 3 Implement

Implementation is the action behind the vision and is step three in our process. In this step, we roll up our sleeves and work shoulder to shoulder with our customers to get the job done. Getting down in the trenches with our clients is something we do on a daily basis. It's what sets us apart. Beyond consulting, we assist with the actual implementation of ideas to help our customers achieve their business and personal goals. We bring discipline and expertise to the specific action steps required and our approach is issues-based, work plan driven, and output-oriented. A high degree of two-way communication throughout this process is crucial and is embedded in our process.

## 4 Monitor

Monitoring is step four, but continues on for tracking the course of a successful vision. Throughout the process of implementation, as we complete projects, we work with our customers to identify Critical Success Factors and develop Key Performance Indicators to monitor the results necessary to achieve success. Critical Success Factors are those processes that you must absolutely get right to be successful. These factors are measured through the Key Performance Indicators, which show how well a particular process is working or the success of a particular project. These can be either financial or non-financial measures. Monitoring is the key to ongoing success.



**SIMONS  
BITZER**

CPAs & STRATEGIC  
BUSINESS ADVISORS