

# Capabilities Brief

Thanks for taking a few  
minutes to learn about our  
approach to Online  
Marketing and Technology  
Management Consulting.  
- Paul Lima

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## STRATEGY

We listen.  
Then, we recommend strategies suited to the objectives we mutually define.

## APPLIED

We implement.  
We staff world-class resources that execute our client's strategies on time and on budget.

## RESULTS

You see results.  
From the start, we define and measure "success". Our clients see our impact in their bottom-line.

## I. OVERVIEW

Founded in 2004, Lima Consulting Group serves organizations that seek lasting improvements through the strategic management of information technology. LCG offers a range of professional services that complement its strategy consulting services, including online marketing, web development, implementation services, business process consulting, technology purchasing consulting, hosting, network security consulting, and project management. Our clients benefit from our experience across many industries, multi-disciplinary thinking and our relentless commitment to exceeding their expectations.

Our combined team has extensive experience in online marketing, interactive media, application development, and strategic consulting technology management. Our strong and consistent growth can be attributed to the growth of our clients and to the acquisition of new accounts based on our performance for past and existing clients. We take pride in the creativity and professionalism of our people and in their many civic contributions.

The strengths we offer clients center on the comprehensive nature of our services. We have established expertise in all online channels of marketing communications, with in-depth experience and resources in each field of discipline.

At Lima Consulting Group, we consider it our mission to produce the most effective forms of online marketing and online presentation possible using the most cost-efficient means. We approach each client relationship as a true partnership—as opposed to a vendor relationship—and we provide strategic recommendations that result in the most effective use of our clients' budgets. Our teams become an integral part of each client's marketing efforts, which means long-term effectiveness and exceptional cost-efficiency.

We create fresh, strategic campaigns that are designed to produce results. We view advertising and technology management as two sides of the same coin, recognizing that each achieves more when they operate in an integrated manner. The involvement of senior management at every level of our company assures each client receives the highest level of services in a proactive, objective-oriented approach.



## II. CAPABILITIES

Lima Consulting Group provides experienced people and resources to deliver business strategies that generate lasting results and on-time and on-budget execution.

### Online Marketing

- Search Engine Optimization
- Pay-Per-Click Advertising
- E-Mail Marketing
- Internet Media Buying

### Campaign ROI Analysis

- Web Analytical Reporting
- Online Marketing Consulting Services
- Campaign Evaluation
- Implementation Services

### Interactive Media

- Web site development
- Software as a Service for E-mail marketing campaigns

### Creative Services

- Web Based Graphic Design
- Logo and Branding Development

### Business Solutions

- Customer Relationship Management Systems
- Content Management Systems Vendor Selection and Implementation
- E-commerce system selection and Implementation
- Market Survey Systems and Polls
- E-Learning Systems

### Information Technology Security

- Network Architecture
- Wireless Security
- Internet and Intranet Security
- Firewall Management
- Virus Protection
- Intrusion Detection
- Data backup and Recovery Services
- Disaster Recovery and Disaster Recover Planning

### Consulting Services

- Marketing and Technology Strategy
- Technology Purchasing Decisions
- Business Process Analysis and Engineering
- Website Traffic Analysis and Campaign ROI
- Custom Application Development

### Vertical Solutions

- Financial Services
- Professional Services
- Field Service Organizations
- Franchises
- Manufacturers and Distributors
- Associations and Non-Profits

### III. PHILOSOPHY

#### *Strategy → Applied → Results <sup>SM</sup>*

We believe the role of a technology and marketing consultancy is to partner with its clients. Our philosophy: **Strategy → Applied → Results <sup>SM</sup>** addresses our belief that we are objective in assessing the clients problem and in recommending the optimal solution within their budget. We also did not want to merely recommend answers, but we are committed to providing the value our clients seek in terms of implementing our findings. Because we believe that “Advice is judged by results, not intentions,” we believe that reporting and accountability are critical in demonstrating our value to our clients business.

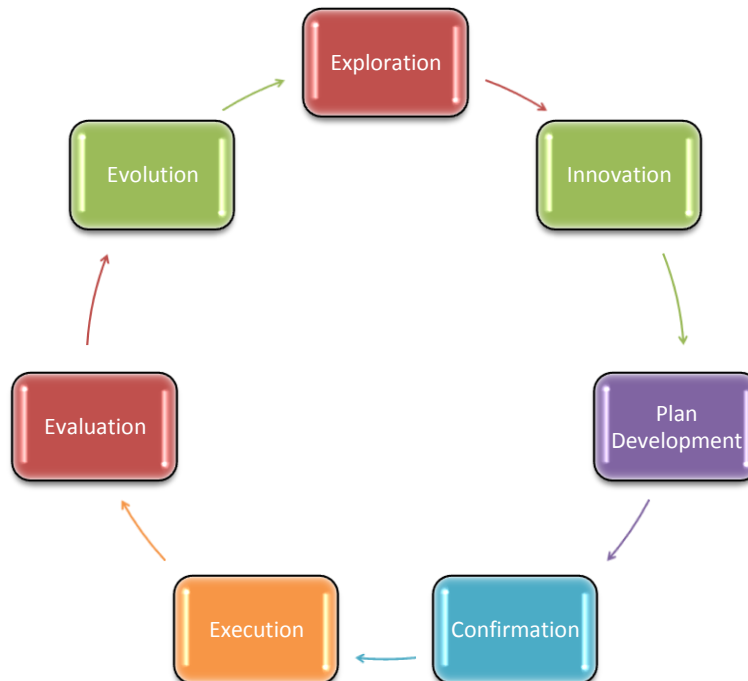
Our support and guidance go beyond the traditional boundaries of marketing and technology consulting. We are in the business to build long-term partnerships with our clients, which is why we exhaust all resources to complete the job.

Our strength comes from the diverse skill sets of our employees. Our staff members and partners contribute to the planning and implementation efforts of our clients. This is most evident in our client roster, which represents a broad array of business categories from retail and heavy industrial companies to entertainment and healthcare firms. Our commitment is to thoroughly dissect a client’s business opportunities and define customer insights. We believe the more we understand about our clients, the better the results.

<b>STRATEGY</b> We listen. Then, we recommend strategies suited to the objectives we mutually define.	<b>APPLIED</b> We implement. We staff world-class resources that execute our client’s strategies on time and on budget.	<b>RESULTS</b> You see results. From the start, we define and measure “success”. Our clients see our impact in their bottom-line.
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## IV. STRATEGIC PLANNING PROCESS

Developing an online marketing strategy is a highly collaborative effort on the part of all the Lima Consulting partners, employees and our clients. This process is both formal in what we're attempting to accomplish and informal in the way we allow "what if's" to be a big part of testing new ideas. The following process represents the steps we take on a daily basis with virtually all our clients. It includes milestones that ensure that we stay on track and focused on the original goals and objectives.



### ***Phase I – Exploration***

Lima Consulting Group's team researches and learns from clients and outside resources the intricate details and the uniqueness of the client's business. This phase is also important to define objectives and goals, define client expectations and determine how results should be measured.

### ***Phase II – Innovation***

This phase is dedicated to our team's need to flush out all angles related to historical perceptions, desired results, long-term and short-term strategies, and our clients goals and tactics. This is where everything is thrown on the wall, and the most appropriate opportunities are explored as "what-if" scenarios."

### ***Phase III – Plan Development***

The plan begins to take form at this stage. LCG determines appropriate strategies and tactics and defines how and when they are executed. The resulting document becomes the working game plan to be executed by all parties.

### ***Phase IV - Confirmation***

Before any execution begins, the plan is presented to the client with a thorough explanation of the process and thinking behind the recommendations. This is where the client will approve the plan or provide feedback. Once completed, necessary modifications are made, and the client has a tangible and measurable program to execute.

***Phase V - Execution***

Phases V through VII are considered a work in progress, but the initial phase is to begin execution of the plan at all levels. This is where the planning turns to real action and when employees, management and customers begin to see change.

***Phase VI - Evaluation***

After a prescribed length of time in the execution phase, evaluation of the results begins. This measurement will be unique from client to client and may vary with different objectives (i.e. customer and employee satisfaction are uniquely supported, measured and evaluated).

***Phase VII - Evolution***

This phase may go on indefinitely and serves as the opportunity to modify the plan and related tactics to continuously improve the performance and results. Based on the desires of the client, this can be an annual or even a monthly process. Much will be determined by the nature of the plan, the needs of the client and the receptivity of the target audiences.



## V. ABBREVIATED CLIENT ROSTER

- **Financial Services**
  - State Farm Insurance
  - [Iquote](#)
  - [Lazard Alternative Investments](#)
  - Longevity Alliance
- **Energy**
  - AmeriGas (NYSE: APU)
  - Blacklight Power
- **Consumer Goods and Retail**
  - All About Books
  - JW Pepper
  - SDI Strategic Distribution, Inc. (NASDAQ: STRD)
- **Healthcare**
  - [Pro Support Systems](#)
- **Entertainment and Media**
  - [Next Stop Hollywood](#)
  - [Mutlimedicus](#)
- **Manufacturing**
  - Nilfisk
- **Transportation and Logistics**
  - Jetway Private Air
- **Real Estate**
  - The Henderson Group
- **Professional Services**
  - [The W Group](#)
  - Array Health Care Facilities Solutions
  - [Global Event Partners](#)
- **Education**
  - Valley Forge Kinder House
- **Travel**
  - [JetWay Private Air](#)
- **Non Profits**
  - The Philadelphia Hispanic Chamber of Commerce

Client	Services Rendered
<a href="#">Lazard Alternative Investments</a>	A privately held subsidiary of the 10 <sup>th</sup> largest global investment bank, Lazard needed a full website with a basic Content Management System, and private and secure access for investors and employees. Privately held company employing approximately 75 employees.
<a href="#">IQuote</a>	The first Term Life Insurance Quoting website. We rebuilt their website and quoting platform, manage the internet marketing strategies and are responsible for implementation of online marketing and e-mail marketing initiatives. The site is the core distribution channel and maintains a positive ROI. Privately held company with 45 employees. <b>Search “<a href="#">term life insurance</a>” on Google and you’ll find them at #7.</b>
<a href="#">JW Pepper</a>	The nation’s largest distributor of sheet music. We conducted an SEO campaign that resulted in significant increases in their online traffic and sales. Annual revenues are approximately \$100 million. <b>Search term “<a href="#">choral sheet music</a>” on Google and you’ll find them at #2</b>
<a href="#">Longevity Alliance</a>	A full service financial services and health insurance company focused on the helping consumers concerned about outliving their assets. We designed and built this website using a content management system and e-mail marketing platform. Founded by the former head of the AARP’s for-profit division. Privately held company backed with Private Equity from Kinderhook Industries.
<a href="#">Amerigas (NYSE: APU)</a>	The nation’s largest distributor of propane. We run Pay Per Click advertising driving internet traffic for their 600 dealers nationwide. Annual revenues are approximately \$2 billion. See an example of what is currently happening online with this campaign by <a href="#">clicking here</a> .

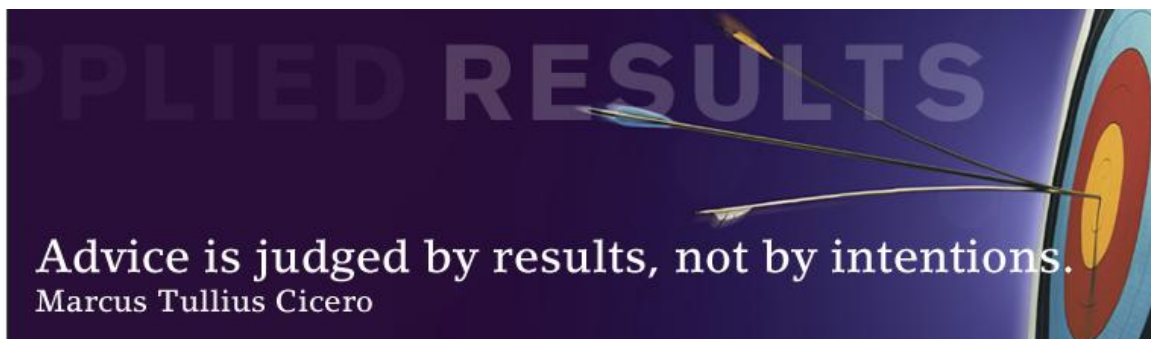
## VI. RESULTS

At Lima Consulting Group, we understand and value the critical nature of accountability toward accomplishing our clients' objectives. We will assess progress at every stage of the process. That means continuous qualitative and quantitative evaluation of strategy, and tactics. By conducting evaluations throughout a program's lifecycle, our research can capitalize on those program elements that are working and help us correct those that are not.

Evaluating online marketing is a process that requires involvement with the client and should be looked at as a mutually agreeable path for success. This process defines measurable attributes; takes benchmark measurements of these attributes; sets measurable and attainable goals; creates time frames for program impact and analysis; defines outside influencers and control factors; and develops analytic processes and response measures.

As an example, focusing on online marketing measurement and evaluation, here are some guiding principles or key factors that we consider at the outset of most programs:

- Establish clear objectives and desired outcomes before we begin to provide a basis for measurement of results.
- Identifying Key Performance Indicators that matter. For example, measuring the increase in traffic to a website is irrelevant. We track progress based on business objectives. Generally, KPIs are measured in leads, quotes, and sales.
- The development of proper reporting that translates technical information such as page views, into business intelligence, such as the strength in the pipeline by source code. In many cases, we assume responsibility for developing these reports using the corporations existing web analytics software, sometimes we implement the software and manage it for the client.
- Unlike other forms of advertising, the ability to measure the performance of online marketing is possible. We take pride in showing monthly reporting for our clients on their progress and advancement towards their business objectives.



## VII. TEAM BIOGRAPHIES

### Paul Lima, e-Business Consultant and Founder

Paul has seventeen years experience in serving industry, government and non-profit organizations.

Prior to starting Lima Consulting Group, he spent seven years in the financial services industry. He served as Vice President of Operations for Global Guardian Group, an investment management firm with offices in Frankfurt and New York. Previously he held positions at SEI Investments (SEIC), a \$5 Billion dollar company, where he developed business and technology strategy and was responsible for new product development and service offerings.



He also served in the US Army and currently serves as a Reservist as the Deputy Commander of the unit supporting the Defense Information Systems Agency (DISA), the Agency responsible for the IT Infrastructure for the Department of Defense. Mr. Lima held Board Positions with the National Society of Hispanic MBA's and founded an "English as a Second Language" program in his community. Paul speaks Spanish and Portuguese and serves on the Philadelphia Boards of Alumni for his Alma Maters, West Point and Wharton, and as an Advisor to the Philadelphia Hispanic Chamber of Commerce.

He holds a Masters in the Management of Technology awarded jointly by the University of Pennsylvania's School of Engineering (SEAS) and the Wharton School and holds a B.S. from the United States Military Academy.



### Milton Huezo, Operations Manager

Mr. Huezo has six years experience in managing online marketing programs for various organizations. He is responsible for the quality of the services rendered by LCG. His experience in retail, financial services and the insurance industries brings depth to the "Applied" within the LCG philosophy: *Strategy → Applied → Results<sup>SM</sup>*.

Previously, Milton co-founded Infinity 2, where he managed the company's marketing department. He is a specialist in developing, implementing, and measuring lead generation programs, search engine optimization, e-mail marketing and all forms of pay per performance internet advertising. He has experience in conducting analysis for the effectiveness of marketing campaigns through the use of quantitative modeling and web analytics software.

He holds an B.A. in Economics and Spanish from Dickinson College and an MBA with emphasis in E-Business from the University of Phoenix.



### **Vanizia Lima, Analyst**

Vanizia Lima is responsible for managing the day-to-day services for the client accounts she manages. Vanizia specializes in managing local search accounts and technology management for web development projects. She is responsible for ensuring the delivery of services for her clients and offering meaningful online marketing insights. Vanizia is a native of Rio de Janeiro, Brazil and speaks Portuguese and English fluently and is highly conversant in Spanish. She is invaluable resource for conducting keyword analysis in Spanish and Portuguese.

### **Aline Prouse, Analyst**

Aline Prouse provides support services for the clients assigned to her management. Her responsibilities include building relationships with key vendors, providing frequent reporting for online marketing campaigns, monitoring trends, assessing innovations, and working with clients to coordinate events, meetings and presentations. Aline also manages the company's certifications as a Minority Owned Business, and Service Disabled Business and Veteran Owned Business and Small Business with the Federal Government, State Government and with the National Minority Supplier Development Council. Aline is originally from Rio de Janeiro, Brazil, and is fluent in Portuguese and English.

### **Karen Johnson, Financial Manager**

With over sixteen years in the accounting industry, Karen brings key insights into the purchasing decision of General Ledger systems and consults on how best to setup systems and processes to provide routine reporting for leaders. Karen also assists in the development and analysis of e-commerce key performance metrics. She also manages the company payroll and recordkeeping and manages the relationship with our accounting firm.

## VIII. LIMA CONSULTING GROUP VALUES

### Integrity

Do what's right, legally and morally. Integrity is a quality developed by adhering to moral principles. It requires that we do and say nothing that deceives others. As our integrity grows, so will the trust others place in us.

### Selfless Service

Put the welfare of clients, the company, and subordinates before our own by placing loyalties to the values of the organization before personal gain. The basic building block of selfless service is based on the commitment of each team member to persevere in making contributions while placing our clients' interests first.

### Duty

Exceed the expectations of others. Your personal expectations demonstrate who you are, and since companies don't make money, people do, our people are the best metric others have in assessing our company's future. Doing your duty means more than carrying out your assigned tasks. Duty means that we execute as part of a team. Our engagements are a complex combination of projects and responsibilities—all in constant motion. Our work entails building one assignment onto another while finding ways to constantly improve ourselves. It's not enough to get great results for our clients, every member of the team owes it to the team to grow along the way.

### Respect

Treat others with dignity and respect while expecting others to do the same. Respect is what allows us to appreciate the best in other people. Respect is trusting that all people have done their jobs and fulfilled their duty. This attribute starts with self-respect which results from knowing we have put forth our best effort. We are one team and each of us has something to contribute.

### Passion for Thought Leadership

Get out in front of our clients' needs by anticipating their challenges through foresight, relentless thinking, and diligent understanding of our clients business and associated risks. Objectively council our clients through our collective wisdom, which is knowledge applied. Seek ways to develop potential through innovation, imagination and applying technology. If it isn't fun, let someone else fix it.

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1 800 381 2471

500 Fayette Street, Suite 200  
Conshohocken, PA 19428



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[www.limaconsulting.com](http://www.limaconsulting.com)

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