



# Strategic Planning Prospectus

Excursions for  
Project Success and Sustainability

“We Simplified Our Universe...  
So That You Could Improve Yours”



A division of CMA Enterprise  
Incorporated



## Greetings

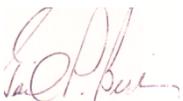
We are proud to introduce our Innovation Center. **The Breakthru Institute (TBI)** is designed to serve as your Conduit to reducing and/or eliminating roadblocks that occasionally arise in our clients' business, talent base, leadership (any level), or processes. Our training experiences focus on best practices, techniques. We also bring into your universe practical tools that are easy to implement in your organization.

Our Training Institute is a wholly owned subsidiary of CMA Enterprise Incorporated and is called The Breakthru Institute. It houses approximately six academies of which one of them is our Lean Six Sigma Academy. Descriptions of the Lean courses follow this correspondence. It is an expansion of our current 25 year old brand and it gives us the latitude to "Explore the Obvious" through Edu-tainment.

We are in the classroom... We are virtual... And We are here to coach you when you want independent study. Our TBI website is [www.breakthruinstitute.biz](http://www.breakthruinstitute.biz)

We look forward to your favorable response and if you have any questions, please contact the undersigned at 954-476-3525 or Oliver Williams at 786-286-0010.

Kindest regards,



Gail P. Birks, EMBA, LMBB, IATA  
Managing Director  
Mediator

# About Us



CMA Enterprise Incorporated is a Process and Performance Improvement Consulting firm. We specialize in raising your levels of maturity and enhancing your capability and capacity. Our approach is to use methodologies tied to the performance and process improvement disciplines that delivers AHA Moments™ again and again.

At CMA our reputation in the marketplace is that we are known for bringing our clients' organizations full circle so that we can move you forward. Our value proposition is ...

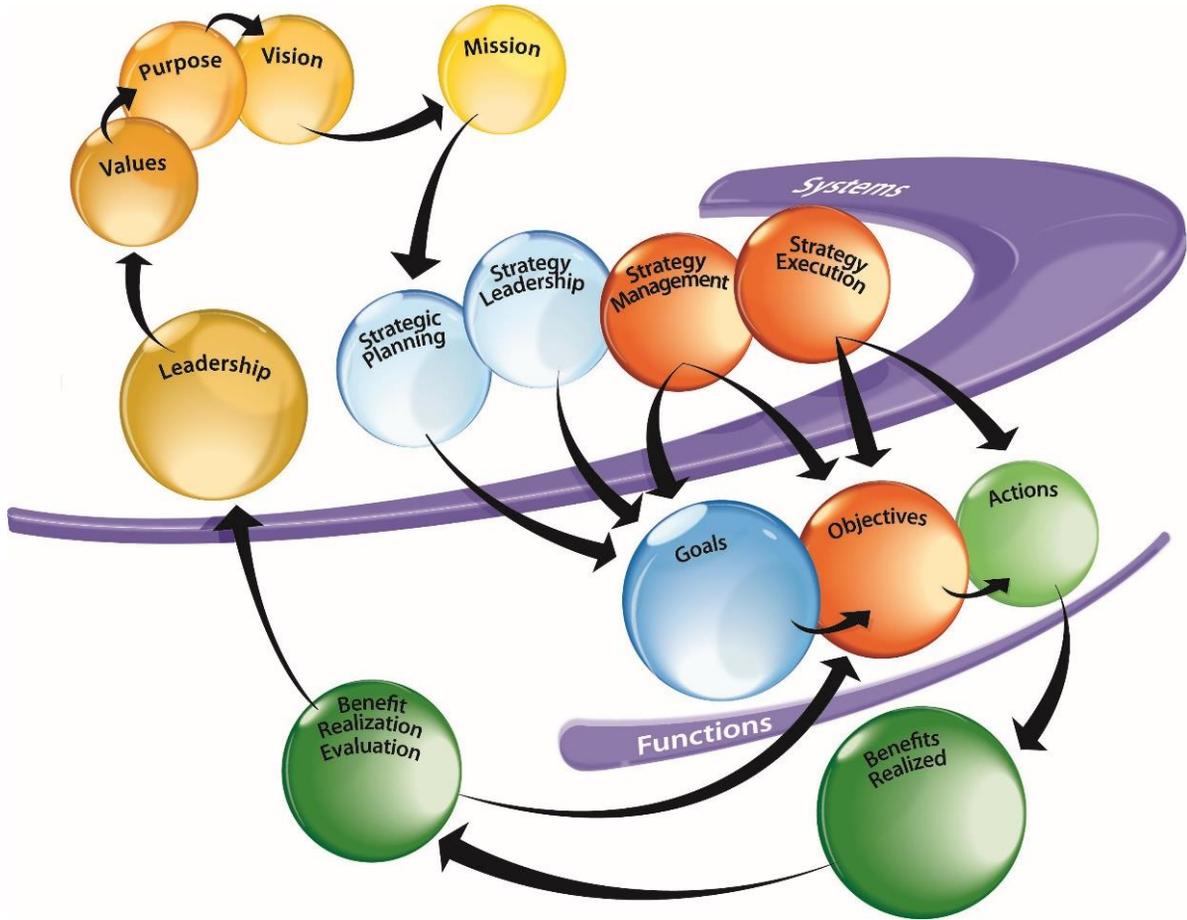
- Reliability
- Accuracy in Solutions Delivery
- Integrity
- Results Oriented
- Professional and Experienced

As a boutique Performance and Process Improvement Consulting Firm headquartered in Davie, Florida our clients receive a personal touch when it comes to service. CMA is an *ISAAC and CSSC Certified* Lean Six Sigma organization. It is also **Certified as a MWBE, DBE SBE, CDBE ACDBE, MWOSB, WBE, WOSB firm.**

Our Team expands and contracts through the use of our strategic staffing partners. Our Team focuses on leading mid-sized and large companies and governmental agencies to sustainable success. We participate in engagements that enables us to facilitate the following for our clients...

- *Mitigate challenging processes and performance issues within your organization,*
- *Facilitate Lean Six Sigma Certification Training and Project Coaching*
- *Recommend cost savings measures for ongoing sustainable improvement,*
- *Facilitate organization and workforce cultural transformation and diversity & inclusion framework,*
- *Enhance and identifying revenue streams when needed,*
- *Develop and/or review operating policies and Procedures for continuity and consistency in your operations,*
- *Maximize your leadership talent through one on one coaching and workforce training*
- *EEO Compliance Technical Assistance*
- *Resolve Conflict with proactive alternative dispute resolution*
- Project Management and Technical Assistance

# The CMA Planning Process



## Technical Understanding:

Because of our in depth experience in facilitating this type of engagement, the CMA Team clearly understands the details of what needs to be done to accommodate this scope of work. Our skills transcend across industry lines and fit any level of employee in an organization/community.

We first research the client’s culture regardless of our familiarity. Second, we give great emphasis on understanding the end goal. Finally, and probably the most important, we listen.

Important to our Clients is that we make it an inclusive process with deliberate steps taken for the desired results.

We take a holistic look at your organization/community and how your **BOTTOM LINE** is impacted by its supporting cast. We use ***an inside out/ outside in approach*** to addressing your business pain points as well as the areas that should continue to be monitored for consistency and effectiveness. The diagram below represents our technical focus to Strategic Planning.

# Our Work Plan

The CMA Team proposes three core tasks for this type of engagement.

## Phase One



### Mobilize the Planning Process

- Obtain approval on the Project Timeline
- CMA Team requests and reviews historical documentation
- Key Stakeholders (individuals and groups) are identified
- Coordinate with staff on reserving the meeting venues and scheduling public notices for distribution
- Initial key stakeholder interviews begin
- Phase one focus groups with Key Staff are scheduled
- Create and Distribute approved Surveys

## Phase Two



### Collect Data through Collaboration and Cross Fertilization

- Facilitate Focus Groups and Interviews
- Review and Organize Data and Feedback Collected
- Prepare interim summary of findings
- Research best practices
- Schedule next phase of feedback sessions
- Facilitate follow focus group sessions/public meetings to obtain feedback on findings. Up to two sessions (one for town staff, one for community)
- Establish Attainable Goals that match the Vision and Mission

## Phase Three



### Formalize Your Plan for Implementation

- Prepare final summary for Leadership and project staff.
- Prepare Executive Summary for Presentation Leadership and other stakeholders
- Time to Execute using your new “Roadmap” designed for sustainable SUCCESS!!!

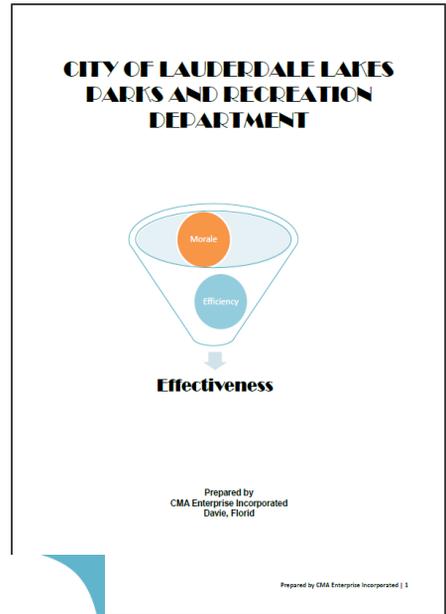
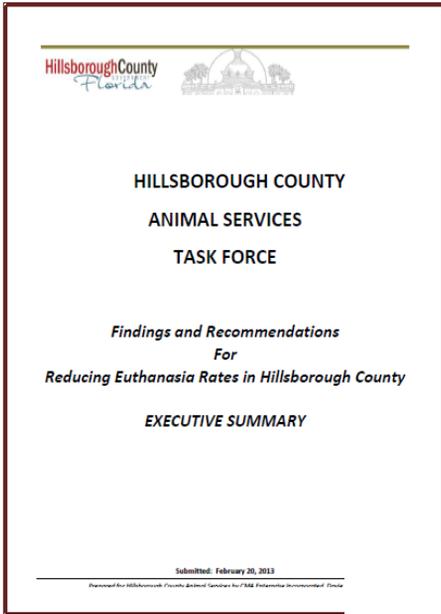
### **Optional**



**CMA is available for ongoing technical assistance for the implementation of recommendations presented in the strategic Plan (Quarterly/Semi-annually/ Annual basis). This is considered a separate engagement.**

# Strategic Assessments and Implementation Plans

Our Client engagements are diverse and range from Community issues, to HR Strategies, to Community Capacity Building and Empowerment and Operating Effectiveness Goal Setting.

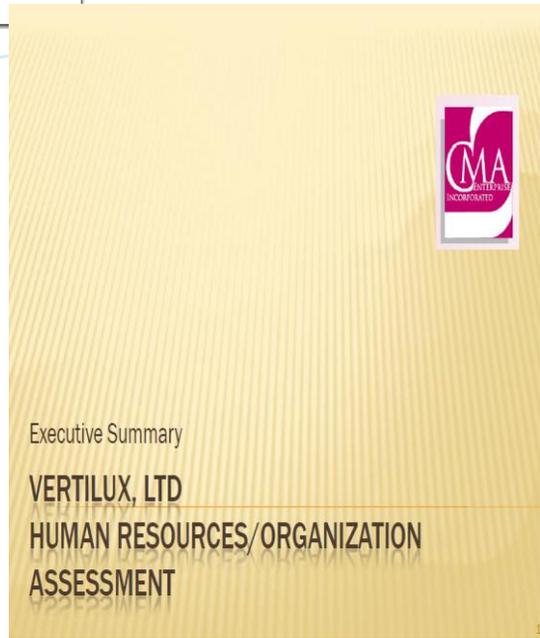
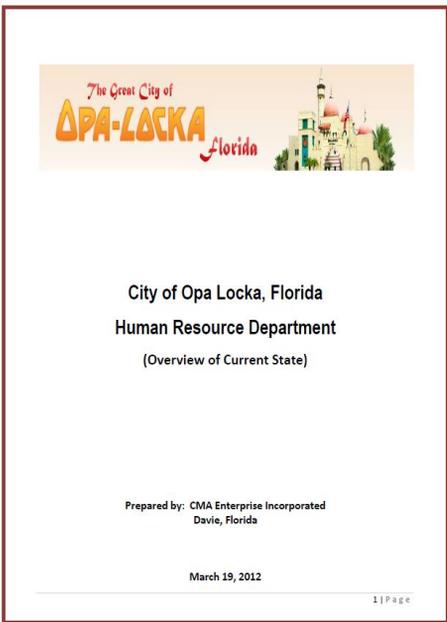


## Miami-Dade Economic Development Advocacy Trust (MDEAT) 5 year Strategic Implementation Plan 2015-2020

FOR REVIEW PURPOSES,  
FINAL DOCUMENT  
SUBMITTED FOR  
FORMAL APPROVAL



Facilitated by CMA Enterprise Incorporated d/b/a The Breakthru Institute  
Davie, Florida  
June 30, 2014



# Lead Consultant/Trainer



## **Gail Birks**

Gail Birks is the founding Principal with CMA Enterprise Incorporated. Professionally, Ms. Birks has served the South Florida Business community for nearly nine years as a Middle Market Assistant Vice President with Southeast Bank, NA and SunTrust/Miami, NA respectively. She holds a Bachelor Degree in Economics and Finance from Tennessee State University in Nashville, Tennessee where she was also enrolled in the University's Honors Program. She is a graduate of the Executive MBA Program at Florida International University and has completed post-graduate work in the area of Industrial Psychology and Personnel Staffing and Administration. She was also voted "Best Presenter" by her 1999 graduating class.

Ms. Birks is also a Certified Mediator and Arbitrator for the Florida State Supreme Court. Her Certifications encompass Circuit/Civil, County and Residential Mortgage Foreclosure. She has extensive experience in mediating conflicts in the workplace, customer service grievances, contract disputes, insurance claims, employee relations (and supervisor/employee matters.).

Ms. Birks has served as an **Independent Corporate Director since 1994**. She has been a part of the governing body of a financial institution that began as a privately held organization before merging in 2005 with a publically traded financial holding company and repurchased by private investors in 2009. Ms. Birks also has over 30 years of experience in board leadership and an expertise in board development and governance having served on and consulted numerous non-profit and civic boards in South Florida. In 2012, Ms. Birks received an invitation from the NYSE to attend a conference of Diverse Independent Corporate Board of Directors in NYC

And in June, 2013, she was a featured panelist for a workshop on "Enterprise Risk Management. A Director's Perspective" and the American Leader's Conference. Ms. Birks was also named as a "Director to Watch in 2014" by **Directors and Boards Magazine** (September Issue).

Ms. Birks, a published author of four books, holds an advanced ***Certification in Lean Six Sigma***. She is a ***Lean Master Black Belt through her matriculation at Florida Atlantic University*** (September, 2013). Her other professional certifications include but are not limited to the following: Certified Total Quality Management Training, Certified Self-Directed Workgroup Training, Advanced Sales Training and Management Credit Training. In 2006 Ms. Birks was selected to be a Protégée with Accenture, LLC at the national level in their Inaugural Mentor/Protégée Program.

Her consulting and business concepts have been featured in numerous cover stories in the Miami Herald and other South Florida Circulars. She has raised the awareness of grassroots and corporate clients through her consulting and training exercises, resulting in heightened awareness in the areas of organization and cultural diversity, self-directed workgroups and high performance teams, and process improvement. She has designed and facilitated sessions as well as consulted on a local, regional and national levels for public, corporate and nonprofit organizations.

Ms. Birks' honors include: 2012 Top 100 Most Influential Black Professionals in South Florida – ICABA; Top 50 Most Powerful Black Professionals in South Florida -2011; Alpha Kappa Alpha Sorority, Inc., Top Hat Award in Business and Entrepreneurship - 2008; Greater Fort Lauderdale Chamber of Commerce Women's Council of Commerce Circle of Excellence Award in Business – 2007; "In The Company of Women", Miami Dade County – 2001; National Association of Business and Professional Women Business Champion – 2001; FIU- Executive MBA Class of 1999, "Best Presenter"; JM Family Enterprises African American Achiever



*Institutional Financial/Investment Advisement  
Municipal Bond Advisor  
Financial Analyst*

Mr. Williams holds a BS degree from Florida State University in Finance and completed post-graduate work from The Donald Regan Institute (Merrill Lynch Proprietary Education Program). He currently is the President/CEO of Argyle Capital, a South Florida based Financial Advisory firm.

Mr. Williams has extensive facilitation experience having led many community groups through difficult and expansive topical issues. He has been integrally involved in assembling meeting events as well as served as a subject matter expert bringing about meaningful resolutions for his clients.

Mr. Williams has extensive experience in equity investment and municipal bond transactions. Over the past 30 years he has been the Lead Principal for SEC/NASD Focus Reporting, heading Investment Banking Teams in the areas of municipal finance, pension fund consulting, corporate public offerings and overall business development. Engagements included: securities sales, trading, underwriting, institutional and accredited investor relations, business development, pension fund performance measurement, analyzing performance of fund money managers, financial advisement.

Served as Co-Senior Managing Underwriter along with Goldman Sachs & Co. in executing the Reagan Administrations Congressional mandate to recapitalize and restructure the government's \$4 billion stabilization effort of Consolidated Railway and list the company's corporate stock on the NYSE and other major international exchanges concurrently in what was the world's largest equity offering at the time.

Mr. Williams has served as a Co-Managing Underwriter in the \$500 million corporate equity listing of Carnival Cruise Lines. The world's largest cruise line on the NYSE. He has also served as a Senior Managing Primary Dealer for the Reagan Administrations \$11 billion congressionally authorized FDIC/FSLIC Guarantee Funds Recapitalization efforts. Mr. Williams additionally served as Co-Senior Managing Underwriter for the State of Florida Insurance Commissions Hurricane Andrew Guarantee Fund which was a catalyst transactional concept that created the state's multibillion dollar catastrophe fund.

Mr. Williams has also been affiliated in Senior positions with M Securities Corporation as a Managing Director/Principal, AIBC Investment Services Corporation as VP-Investment Banking, First Florida Securities Inc., as a Senior Account Executive, Prudential – Bache Securities, Inc and Merrill Lynch, Pierce, Fenner & Smith. He also worked with the U.S. Treasury Department as an ATF Inspector.

He holds professional licensing that include but are not limited to: General Securities Principal \* General Securities Sales \* Uniform Sales \* Uniform States \* Municipal Securities Principal \* Municipal Securities Sales \* Financial Operations Principal-Fully Disclosed \* Financial Operations Principal-Self Clearing \* Florida Life/Health/Annuity \* General Commodity – CFTC. Mr. Williams is also a certified Lean Six Sigma Green Belt.



“We are the Organizers of  
Your Business Puzzle”

~Gail P. Birks, President



THE  
BREAKTHRU  
INSTITUTE

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