



**JOINTPIVOT**

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STRATEGIC PLANNING | CHANGE MANAGEMENT | PROCESS IMPROVEMENT | PROJECT MANAGEMENT | LEADERSHIP DEVELOPMENT & COACHING

**JOINTPIVOT** provides immediate value without the hassle of additional headcount

Available for full and half-day sessions, or by proposal for: facilitated strategic planning, problem solving and process improvement, start to finish project and change management, full training program development and delivery, and coaching. Let us partner with you, on demand, to get things done.

We partner with business leaders to dig down to the root cause of their issues, solving problems and creating opportunity right at the pivot point. Using our training and experience we deliver creative plans and solutions, utilizing our talent or training yours.

JointPivot has cultivated a large library of solutions that will play a big role in achieving your goals and capitalizing on opportunities. We have covered a few of those above that may be of help based on our discussion, but if you don't see it just ask us! We've probably run into it during our collective 40+ years of living continuous improvement.

## DO YOU NEED TO... PIVOT WITH US?

- Need the expertise to help implement a major initiative while you focus on growing your business?
- Want to build upon the success you've accomplished and enhance your strategic plan or growth road map?
- Ready to invest in your teams development and enhance their contributions to your companies performance?
- Primed to identify opportunities for improvements to drive more value and reduce inefficiencies in your process?

## A SAMPLE OF HOW WE PIVOT

- Hands on, customized approach to create strategies and implementation plans
- Thorough understanding of your process to identify cost reduction opportunities
- Proven, straightforward techniques to improve motivation and engagement
- Implement measurements to know you're winning each day
- Provide immediate value without the hassle of additional headcount



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# WHAT OUR CLIENTS HAVE TO SAY

Business review invoice

# JOINTPIVOT

## ...PIVOT WITH US

"Working with JointPivot has been awesome! The team is knowledgeable, helpful, realistic, and supportive. They listen to the needs of our company & give the best advice for moving forward. Their knowledge & expertise in project management & process improvement has positively impacted our company--we can't wait to see more of the results as they are implemented! Plus, these ladies are super fun to work with--they make even the long meetings entertaining in some aspect! They also make you feel comfortable being open & honest with them--I have had no issues explaining what the problem points are in a process & they have been able to manage everything thrown at them no matter how crazy it is. I highly recommend connecting with them if you are in need of some project management, process improvement, & more--you won't be disappointed!"

- Holly

"Julie has been able to completely customize the Continuous Improvement program to match our culture and needs. She's worked hand in hand with our leaders to ensure everyone understands the tools and concepts while helping us define and prioritize our strategic path."

- Joe

"Great meeting today Julie. I look forward to our coaching sessions. I appreciate the tools you share helping me be organized, productive and focused on business goals. My dashboard provides a high level overview to share with leadership while allowing me to see the details so I know how and where to support my team. Looking forward to our next meeting."

- Pam

"Within 1 hour, Jenn asked a handful of questions and was able to put together a plan to help take our sales training to the next level. She helped us sort out information and assemble it into an easy to use training schedule. Her plan was easy to follow, each activity was in manageable bites, and we've already seen progress in less than 1 month. We can't wait to tackle our training documentation with her."

- Jeffrey

"I've worked closely with both Jenn and Julie and can confidently say that their involvement is what consistently finds order in the chaos and gets projects over the finish line. They bring an expertise and passion to their work that has inspired me to pursue a career of my own in continuous improvement and project management. Julie's coaching sessions are relevant and informative and allow me to take what I've learned and apply it into my role each week. JointPivot is the solution you've been looking for!"

- Sam

"I'm always impressed and inspired by Jenn's upbeat positive energy! That, along with her passion for continuous improvement and knowledge of the tools, helped us drive change in an environment that was reactive and stagnant. Our project completion success rate has improved by at least 50%!"

- Ana

"We brought JointPivot in as a neutral facilitator to help us evaluate our processes. Julie not only helped us identify our key business processes, but who was responsible for each of them, and the health of the sub-tasks. She delivered a prioritized list of opportunities that made our resource planning run as smooth as it ever has."

- Curtis

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# ABOUT US



Julie Miller is a certified Six Sigma Master Black Belt, Prosci Change Management trainer, and iPEC certified performance Coach (ICF PCC) with a unique educational background. Julie has a Bachelor of Science from the University of Wisconsin in Mechanical Engineering and Master of Science from the University of Wisconsin in Organizational Behavior. This unconventional mix allows her to customize her strategic planning, training, and improvement sessions specifically to match the make-up of her audience, the capabilities of her participants, and the needs of the culture to support the change. Those who have worked with Julie have learned that events with her are never absent of a few laughs.

Julie has established Strategic Planning, Lean, Six Sigma, Change Management, and PMO at multiple organizations, creating the structure, training, and culture for success. She enjoys turning complex initiatives into actionable plans. She has served as a Master Black Belt mentor and lead trainer for 7 cycles of formalized practitioner development and 3 waves of Lean Six Sigma Black Belt training and certification across service and manufacturing organizations. Her 20+ years of creative problem solving has led her to be recognized as one of the 40 New Voices of Quality by the American Society of Quality.

Jenn Tankanow has 20+ years of proven ability to teach, lead, facilitate and apply Toyota Production System and Lean principles, Strategic Planning, Change Management and Continuous Improvement. These skills have helped both product and service companies create their vision, define objectives and implement transformative processes, ownership and accountability throughout their organizations. Jenn has a Bachelor of Science in Packaging and MBA from Michigan State University and has held individual contributor and leadership positions in multiple supply chain functions, fleet maintenance, talent acquisition, IT system rollouts, lean, continuous improvement and project management deployments. Jenn contributed over \$130 million in cost savings and avoidances and helped define, document and improve countless numbers of processes, SOP's and work instructions.

Her passion is to positively impact the culture around her by challenging and motivating all levels of employees to grow, learn and identify their untapped potential and teach them how to use standard tools to create unique solutions to help themselves and their organization. Jenn believes that when an organization's vision is understood by all levels, culture principles are demonstrated by leadership, employees have clear expectations and the training to perform, everyone will thrive, and the company will surpass its goals.

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Business review invoice

# JOINTPIVOT

## ...PIVOT WITH US

Receive invoice later and never pay

Send the invoice to the wrong person

Printed code invoice

Is the vendor set up?

Can I business the other way?

Can the invoice be processed?

Can I get the invoice?



# STRATEGIC PLANNING

Strategic planning establishes the direction, or true north, for the business. Our sessions will help sharpen the focus to maintain progress, identify risks, or shift direction as the environment changes allowing us to be nimble and responsible while knowing we are working on the opportunities that really make an impact. Regular check ins can help the business develop the right goals and targets, identify the projects to support them, establish a level of accountability, and provide a dedicated time to review the people, process, and systems that drive success.

## THE IMPACT

Let us organize and facilitate your strategy sessions so you can participate fully, not having to worry about keeping the team on an agenda.

### Session Success Metrics:

- Complete roadmap plan with actions and milestones
- Annual Plan compiled, with goals and metrics identified
- Open, honest facilitated conversations around the big issues, that move the business forward

Ideally strategic and roadmap planning sessions are held on a quarterly or biannual basis. Establishing a 3-5 year vision for the functions will ensure that yearly goals and action plans are contributing directionally towards the vision. They also serve as a planning guide and accountability document for the team. It is recommended that the facilitator of these sessions not be a participant in the process as it can be difficult to wear both the subject matter and facilitator hats simultaneously. Allowing an outside party to run and objective process will allow you to fully participate and bring your full capacity to the sessions

JointPivot offers full service strategic planning utilizing concepts from Hoshin Kanri, EOS, Balanced Scorecard, and OKR customized to meet your business needs, leadership levels, and culture.

## THE INVESTMENT

Packages starting at \$4,000, or hourly rate available

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**JOINTPIVOT**

...PIVOT WITH US

Business review invoice

Review invoice later and review pay

Send the invoice to the client

Print & code invoice

Is the vendor set up?

Does the business have proper tracking?

Can the invoice be tracked?

Can the invoice be tracked?

Callout for next feature

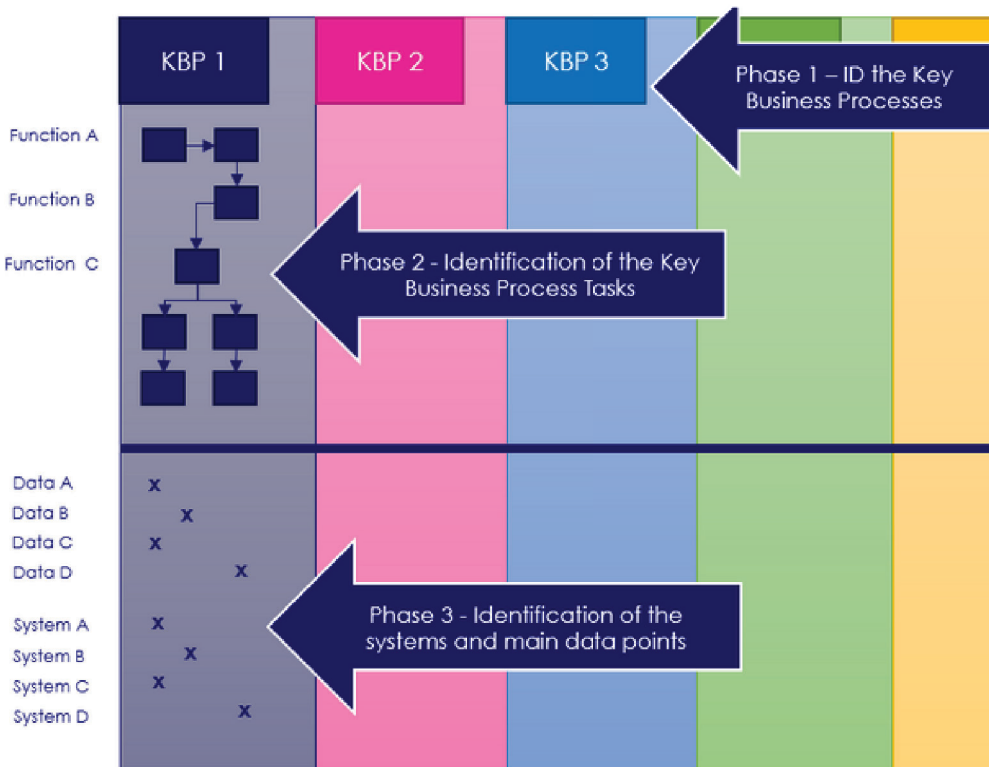
# KEY BUSINESS PROCESS MAPPING

**JOINTPIVOT**

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An easy-to-understand visual that identifies all of the key business processes specific to your business.

Key business process mapping lays out the actions performed across the company, those 5-7 major buckets of work we do that drive the organization. By identifying the tasks that happen in each of those buckets, we can document which function owns it and is responsible for the tasks, what data is gathered, and what systems are used. Throughout the efforts, we will complete assessments of the current state of the processes, data, and systems to deliver the information needed for the next steps of prioritization.



## THE IMPACT

key business process map creates a clean visual to see all of the entire high-level processes of an organization, as well as who and what function owns each of them.

There is no question anymore on who participates in what part of the business processes, or what impact each employee has on the overall value. Once created the document can be used to onboard, train, plan and prioritize, diagnose issues, and can serve as a system map. Key business process maps are also helpful if used as a dashboard on it's own to quickly monitor process health.

## THE INVESTMENT

Packages starting at \$5,000, or hourly rate available

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# CHANGE MANAGEMENT

ADKAR is an acronym that represents the five tangible and concrete outcomes that all people need to achieve for lasting and meaningful change:

**AWARENESS**  
**DESIRE**  
**KNOWLEDGE**  
**ABILITY**  
**REINFORCEMENT**

Utilizing the concepts of ADKAR change management we can partner with you to:

- use our resources to craft an implementation plan that gets you higher adoption rates on your change efforts
- train your employees how to process change easier
- train your leaders how to effectively lead change
- help identify why changes aren't sticking, the resistance that exists, and how to address it

Our President, Julie Miller, is a certified Train the Trainer for PROSCI Change Management and the ADKAR methodologies.

## THE IMPACT

Using the concepts of ADKAR we can increase the awareness, desire, knowledge, ability, and reinforcement efforts directly impacting the people side of change.

Our assessments and tools walk you through the change in a methodical way that puts the people first, and focuses on the role of the leader as a communicator, liaison, advocate, resistance manager, and coach.

This can be as simple as a few hours of discussion for a single project or initiative, or as big as creating a change management competency and training program in your organization that drives the culture and all future projects.

## THE INVESTMENT

Packages starting at \$2000, or hourly rate available

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# LEAN & SIX SIGMA TRAINING

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Let us take the pressure off your team, or side-step an expensive hire. We can get your team up to speed using our content, or create a custom curriculum and content to match your culture, mission, and vision, with industry specific examples and exercises.

## A FEW OF OUR FAVORITE PACKAGES

- Basic Problem Solving and Process Improvement: Kick Off Documents, Process Mapping, Brainstorming, Fishbone Diagrams, 7 Elements of Waste, Kano Model, Pugh Concept Selection, Responsibility Matrices, Project Plans, Communication Plans
- Pick the Right Solution! Criteria Definition and Solution Selection: Brainstorming, Kano Model, Pugh Concept Selection
- Process Tune Up: Value Stream Mapping, Process Mapping, Standard Operating Procedure (SOP) Writing, Control Charts

JointPivot's President, Julie Miller, is a certified Six Sigma Master Black Belt and Lean Master. She has stood up continuous improvement programs from the ground up at over a half dozen companies. Each time she has created programs that matched the needs of the company, their culture, and the employees using a blended approach combining the tools and concepts of lean, six sigma, project management, and change management. The key is matching the complexity of the tools and solutions to the complexity of the problem.

We offer:

- Full White, Yellow, Green, and Black Belt DMAIC and DFSS Programs
- Full Lean Fundamentals and Lean Leader Programs
- Full Continuous Improvement Practitioner Programs

All training and programs can be customized to your company and goals

## THE INVESTMENT

Packages starting at \$5000, or hourly rate available

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# PROJECT MANAGEMENT

The logo for JOINTPIVOT, with 'JOINT' in dark blue and 'PIVOT' in pink. The background of the top right corner features a blurred image of a meeting room with sticky notes and a whiteboard. Some sticky notes contain text like 'Business review IMPACT', 'Review Invoice, Sales and other info', 'Send me my copy of the program', 'Print of code invoice', 'Is the vendor set up?', 'Can I business the other way?', 'Can the product be used in another way?', and 'Callout for next session'. A whiteboard in the background has a diagram with a circle and arrows, and the text '30 Day' is visible at the top right of the image area.

...PIVOT WITH US

We will implement your future state, so you can focus on growing your business. When it is time to implement a major initiative, there is no need to hire, onboard and manage a skill set that does not fall in your core competencies. Take advantage of our project management expertise. We'll create the plan, manage all of the details to ensure the project hits its defined goals.

Need us to train a few of your employees? Here is an example of one of our favorite Project Management training bundles:

## Project Management for Any Role

- Project Plans
- Roles & Responsibilities/RACI Matrix
- Status Reports, Stage Gate Process
- Waterfall Method
- Risk Management
- Soft skills including: Time Management, Delegation Without Authority, Decision Making

## THE IMPACT

Project management is one of those things that looks easy until you try it. The benefits of having a defined plan that organizes the chaos is invaluable. Even a basic plan holds people accountable to the deliverables that are required to move the project forward, ultimately realizing the impact of your efforts in a more timely manner.

You'll be able to know if you are on track, and if you're not we'll be able to show you what is off and where to focus more attention or resources. Imagine being able to sit back and not be constantly worried about the status of an initiative.

## THE INVESTMENT

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# LEADERSHIP DEVELOPMENT



**JOINTPIVOT**

**...PIVOT WITH US**

Everyone is a leader from the moment they open their mouth. Therefore, equipping them with skills like gaining trust, motivating others, building teams, challenging expectations and performance is required to achieve your strategic goals. Our 360-degree training focus develops both hard and soft skills for all levels in your organization from first year supervisor to tenured executive. Investing in your employees demonstrates a commitment to their development and recognition of their positive impact on your company's performance.

A few of our training offerings:

- Remote Leadership Success
- Servant Leadership
- New Leader Orientation
- Behavioral Based Motivation
- Setting Clear Expectations & Goals
- Challenging Conversations
- True Colors Assessments
- Team Building Activities

## THE IMPACT

Investing in your employees demonstrates a commitment to their development and recognizes the positive impact they make on your company's performance.

The cost of poor leadership is immense. It can negatively impact retention, trust, decision making, and engagement. A strategy of hiring external talent sends a message that existing employees are not valued and cannot grow into future leaders of your company.

Leadership development initiatives highlight that your business has the talent to create and execute strategies, navigate change and adapt in challenging situations. These programs increase organizational agility, enable leaders to motivate their teams, improve high potential retention, and most importantly create the next generations of leaders.

## THE INVESTMENT

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# PROBLEM SOLVING & PROCESS IMPROVEMENT



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Full scale problem solving and process improvement, overhauling an entire program, or just a quick day mapping session. We facilitate your continuous improvement efforts, and train your team along the way. We won't limit the discipline, we'll find the best combination of lean, six sigma, and change management to address the people, process, and systems. The complexity of the tools and solutions should match the complexity of the problem you are trying to solve.

We know what great looks like. We help innovate and improve company's processes to gain control over everyday operations so leaders can continue focusing on growing their business. Defining and documenting processes is a large task, but required for continued, repeatable success. It is a valuable exercise with output that allows for faster on-boarding, clear expectations, improved communication as well as faster decision making, which all have direct impact on your bottom line. Documenting your activities enhances your control of daily operations. You have confidence that the team will take ownership in their responsibilities, cost reduction opportunities can be identified and everyone knows what winning means on a daily basis. We help you build upon the success you have already created.

## THE IMPACT

Defined and documented processes are invaluable for any company. For example they support faster decision making, alignment, clear communication, and quicker on-boarding. Visualizing processes also helps identify opportunities for improvement, areas of waste, possible cost reductions, redundancy identification and overall ownership.

JointPivot's Vice President, Jenn Tankanow, started her career at Toyota learning the Toyota Production System. Jenn proves that lean and continuous improvement isn't only for manufacturing when she applies fundamentals to HR, Sales, Marketing and other home office functions. No single approach is the solution for everyone, one size does not fit all!

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# EXECUTIVE & PERFORMANCE COACHING

We don't always know how, or what is holding us back. It could be people, it could be our own aspirations, or just the fear of change and the unknown. Through the process you start to look at issues and opportunities in a way you never have before. Coaching can be the catalyst that profoundly shift the trajectory of your life, enabling you to change the quality of your life and the direction of your career in ways you never dreamed of.

Outcomes clients have had:

- Became more aware of their own energy and the influence it has on others
- Look at all situations as an opportunities where they have the power choose how to respond, nothing "happens" to them
- Set meaningful boundaries for themselves and others
- More confident conversations and interactions, even on the fly
- Solid, easy to execute, plans to move their priorities forward that they own

# PIVOT

## WITH JULIE

A  
**JOINTPIVOT**  
COMPANY



### QUARTER PIVOT

Two 1-hour sessions with Energy Leadership Assessment  
Starting at \$750

Not sure if coaching is for you? The quarter pivot package provides a kickstart Energy Leadership Index Assessment, with a debrief of the assessment as one of the two 1-hour sessions.



### HALF PIVOT

Four 1-hour sessions  
Starting at \$1500

You know what you need to do, but can't pinpoint why you are still missing the mark. The half pivot package offers four 1-hour sessions at your pace.



### FULL PIVOT

Eight 1-hour sessions  
Starting at \$1440

There is nothing stopping you! You are fully committed and ready to give everything it takes to write your own story. The full pivot package offers eight 1-hour sessions to get you where you need to be on your schedule.



### THE PIVOT PLAN!

Two 1-hour sessions  
Starting at \$400

Not great at creating plans? The Pivot Plan! is two 1-hour sessions to define your values and create goals with activities to achieve them for the next 6-12 months, and creating a personal plan for you to follow.



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### **ALL PACKAGES INCLUDE:**

- Easy to schedule sessions via Calendly, with your own progress dashboard
- Access via audio, video, and face to face (per contract)
- Two 15 minute quick check-ins per month if you need a quick boost

### **ENERGY LEADERSHIP INDEX (ELI) - ADD ON**

Want to kickstart your sessions? Choose the ELI Add On to round out your package purchase and we'll debrief as one of your hour long sessions.



# EXECUTIVE & PERFORMANCE COACHING

"I've been receiving coaching from Julie for close to a year now and it's been the best thing I have done for my career to date. Julie has taught me a skillset that has launched the trajectory of my career and I found a passion in my work that wasn't there before. Because of the wealth of knowledge Julie has shared with me, I feel confident that I could walk into any department and find a way to bring value. What makes Julie a great coach is her ability to relate material directly to the real life scenarios a person faces everyday at work and at home. From soft skills like how to manage crucial conversations, to hard skills like how to effectively manage and implement change, everything we discuss is relevant to my role. Being able to learn something on a Monday and apply it on Tuesday means increased efficiency and quality in the work that I do. I'm beyond grateful to have Julie as my mentor and would recommend her to anyone with the desire to continuously improve."

-Samantha in Michigan

"I enjoyed working with Julie so much! When I started working with her my confidence was lower than I'd like. Through some 1:1 coaching, Julie helped me find my voice & be comfortable with sharing my opinions. Not only that, she gave me skills to help with having hard conversations & how to lead a group effectively towards a resolution. She often coached me by asking insightful questions that I still ask myself occasionally; it's helped with re-framing my perspective on dealing with different personalities in my work environment, but also in my personal life. Since working with Julie, I have noticed a change in my demeanor--I am no longer closed off to confrontation or tough situations; I look at each one as an opportunity to grow. I am able to feel more comfortable & confident going into meetings because of the tools Julie shared to help me understand my preconceived notions of others. She is very skilled in seeing things from an outside perspective & giving you advice on how to approach the situation. You will not be disappointed if you work with Julie!"

-Holly in Texas



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30 Days  
**PIVOT**

WITH JULIE

A  
**JOINTPIVOT**  
COMPANY

# WANT TO TALK WITH OUR CLIENTS?

We love our clients just as much as they love us. If you'd like to set up a conversation with any of them to talk about their experience with JointPivot just let us know.



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