

Unlock the Power of Your Team



How I Can Help Your Clients...

How I can be of greater service is always top of mind for me.

All of us have a network of people in our professional and personal lives. I am interested in supporting you to best serve and support those in your network. It is this gift of sharing between these networks that has made and continues to enhance our world, our businesses and our personal lives. The difficult part of sharing is expressing succinctly what your clients needs are.

Therefore, I have created this document in order to help you understand the areas I may be able to help you support your clients.

The Lefko Group has grown thanks to referrals and personal introductions, so I invite you to read on and learn about my company, our services and clients in hopes that we might find mutually beneficial connections and continue to thrive in this new business world.

What is the Lefko Group?



Mark A. Lefko
Founder, Lefko Group

Lefko Group is a business advisory and consulting firm founded in 2001 by Mark Lefko.

We work with business leaders and companies to discover and implement value-based business strategies and to *Unlock the Power of Their Team*.

We believe in top – to – bottom communications delivery and coach CEOs through organizational turning decisions.

Services Provided:

- CEO Coaching / Mentoring
- Corporate Offsite Retreat Design and Facilitation
- Business Leader Roundtable/Mastermind Group Formation and Facilitation
- Management and Board Connection – For Profit and Nonprofit
- Strategic Planning
- Contingency Planning
- Management Team / Partner Conflict Resolution
- Law Firm and Accounting Firm Practice Group Retreats
- Teambuilding Summits
- Exit/Succession Strategies
- New Product / Service Ideation



www.lefkogroup.net
www.unlockthepower.net

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Why invest in these services?

It isn't necessary for us to tell you about the changes currently taking place in the business world; you are living it every day. What Mark Lefko and his associates can provide are clear, concise and focused methods to help to go beyond dealing with these changes and conflicts to a new level where you and your team can implement new strategies that create opportunities and growth within the chaos.

Companies we work with:

- **Businesses with revenues of \$20 million to \$1 billion in any industry... as we have experience in over 20 industries.**
- **CEOs of companies who have 50+ employees that are in both growth and downsizing cycles.**

Geography:

Currently, Mark works with companies nationwide, many that manifest a global impact.

An ideal introduction:

We are all individuals and communicate at different levels; so whatever method, by email, phone or in person meeting, introductions are all welcome. I promise to treat your clients with utmost respect and confidentiality and I understand that introductions are exploratory. I would be honored to help you and your clients. If I am not the right fit, I will be honest and perhaps I will have an affiliate that would better suit their needs.

On any level that our paths may cross, I look forward to it. **Feel free to use this document as a guide to tell us about your needs, we want to know.**

Thank you in advance for your consideration and support.

Mark A. Lefko
Founder, Lefko Group

Who we want to do business with:

- **CEOs of companies with gross revenues of \$20 million + or 50 or more employees**
- **Companies who value their employees and want to foster greater collaboration**
- **Entrepreneurial companies with a social conscience**
- **Executive groups and Associations that need meeting/retreat facilitation**
- **Companies in times of transition/change with management and Boards**
- **Companies that have internal management conflicts**
- **Law Firms**
- **Accounting Firms**
- **Speaker bureaus**

Unlock the Power of Your Team



A Retreat Is A Business Tool

A retreat is a rare business opportunity. It's a chance to bring together the best and brightest members of your executive team, so they can work—away from the office and without distraction—on projects that have a substantial payoff for your organization.

What Clients Want To Work On During A Retreat

- The company needs help with its strategic direction.
- The company knows where to head, but it's not sure about tactics.
- Everyone is firefighting, and that keeps them from the tasks that matter.
- Management is having turf wars, and it's killing the company.
- The lines of communication are stopped up, and no one is sharing.
- They want to build consensus for a project.
- They want to create a product.
- They want to reposition a service.
- They want to increase top-line revenues.
- They want to strengthen profitability.
- They want to cross-sell among divisions.

"You leave the retreat having accomplished exactly what you wanted to accomplish when you walked in...We've not only increased our sales by 48%, we've increased our profitability by 85%."

—Barclay Hope
President
Albert's Organics

"Mark's gift is that he understands communications AND business... Since his retreats and meetings, our revenue has risen 80%."

—Lester Friedman
CEO
Great American Group

How We Are Different

There are a lot of facilitation companies out there. Most of them know how to prepare for a retreat. What they don't know is high-level business. They have never managed a corporate division or structured a deal worth hundreds of millions of dollars.



Mark A. Lefko
Founder, Lefko Group

That's where the Lefko Group is different. When you hire us you get, as head planner and facilitator, our founder and CEO, Mark Lefko.

Mark's hardcore business background is extensive. He spent seven years as a CPA with Arthur Andersen, four years as CFO of a \$6 Billion mortgage company, nine years as an investment banker, and two years as a Chairman at TEC Worldwide (the international CEO organization). Currently, he serves on six advisory boards. Mark has created and facilitated over 80 retreats and meetings, and coached over a hundred CEOs and Presidents on how to get the most out of their strategy and people.

Profit From Mark's Knowledge and Experience

Because of his knowledge and experience, Mark sees things others miss, such as a hole in your business plan or a sales opportunity that you've passed by without noticing.

Due, in part, to the retreats Mark has facilitated:

- A national inventory appraiser increased its worth by 80%
- A food distributor raised its yearly sales by 48% and its profitability by 85%
- An insurance brokerage firm grew its revenue-per-employee by 29%, its overall revenue by 99%, and its market value by 146%



Our Retreat Programs

- Strategic Planning and Business Plan Development
- Law Firm and Accounting Firm Practice Group Retreats
- New Product and Service Development
- Teambuilding
- Sales and Marketing Plan Development
- Management and Board Connection
- Conflict Resolution
- Acquisition Integration

"Mark put together our 'Operational Excellence' retreat... He kept all fifty of us engaged and ontask for two days, so we could get the job done."

—Bill McGinnis
CEO
National Technical Systems

"Because of Mark, our firm's retreat turned out to be a tremendous success."

—Jim Freedman
Managing Director
Barrington Associates

"Mark facilitated at our YPO chapter's Presidents' Retreat, and did an outstanding job. In fact, the 75 members who attended rated it a 9.9!"

—Rick Powell
Young Presidents
Organization
L.A. Chapter

"We learned how to drive new business to the firm and how to work better as a team... That kind of thing has to be facilitated. Just putting people in a room gets you to Level One, but what Mark does gets you to Level Nine."

—Larry Braun
Senior Partner
Sheppard Mullin



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Mark Lefko Founder, Lefko Group



Mark Lefko, founder of the Lefko Group, is one of the nation's leading facilitators for Business and Transformational Roundtables focused on unlocking the power of business leaders and senior executive teams. With over thirty years of broad-based business experience in a wide variety of industries, he has coached and mentored over one hundred CEOs, Presidents, and business owners in over 21 industries as well as working with senior executive teams taking them to a higher level of effectiveness, clarity, and purpose as business leaders.

Mark is the author of "Unlock the Power of Your Team," the theme that his company utilizes in coaching, mentoring, retreat facilitation, and strategic planning. Each event is custom designed with a 'high touch approach' to his client companies and their processes and needs.

Mark's extensive experience as a Business Roundtable facilitator includes years of CEO mentoring, leading strategic planning sessions, and senior executive teambuilding and high impact meetings across America. He has personally organized and led over 150 Corporate Think Tanks, Industry Roundtables, Peer Groups, Leadership Councils, Summits and Master Mind Groups for some of America's leading executives. Described as a uniquely gifted facilitator and corporate mentor, Mark brings a passion to each event he leads sparking a highly effective exchange of ideas and solutions for its participants.

Mark serves as the facilitator for the National Builders Alliance (NBA), which has two peer groups of CEOs and COOs of commercial construction companies with revenues of \$500 million to \$1 billion. He has served as a Chairman for Vistage (formerly known as "TEC Worldwide"), an international CEO peer group organization with 14,000

CEO members in 16 countries around the world and led two CEO roundtable groups.

In addition, he is a resource for Young Presidents Organization (YPO), another international CEO and President membership organization, where he facilitates Forum and President retreats. He also served as a board member on five advisory boards and two, non profit and association boards. Mark guides associations and leadership organizations through the process of teambuilding, building advisory boards, orchestrating strategic planning sessions, and improving internal company communications to create a values-driven culture.

A sought-after speaker and teacher, Mark has been a speaker for the National Association of Women Business Owners (NAWBO) and the 101 Business Leadership Forum. He is a former visiting faculty member at the Business School for Entrepreneurs in Kuala Lumpur, Malaysia, where he taught over 100 business owners ways to enhance the value of their businesses through corporate transactions.

Mark has a well-rounded background in finance, mergers & acquisitions, financial leadership and management. His experience comes from having worked on both the inside and the outside of corporate and business management. Prior to founding the Lefko Group in 2001, he founded and served as President of Tegra Capital Associates, a Los Angeles - based company focused on mergers & acquisitions.

Previously, he was the Merger & Acquisition partner for a boutique investment banking firm in L.A. where he was responsible for completing over 50 corporate transactions. Before that, he served as Chief Financial Officer and acting Chief Operating Officer for a \$6 billion mortgage banking company (12th largest in the U.S. at that time) and spent seven years with the Big 5 CPA firm Arthur Andersen.