







# TRANSFORMING INSPIRATION INTO IMPLEMENTATION



#### **Our Vision**

To create seamless organizational process flow through the integration of training and technologies enabling management <u>with</u> quality rather than management <u>of</u> quality.

#### **Our Mission**

#### To provide our...

...customers with products, services, training programs, resources, materials, and technologies that are high quality, consistent, concise, relevant, and comprehensive.

...employees with a quality compensation program that focuses on personal and professional growth.

...organization with a favorable return on investment in order to provide future growth opportunities and the ability to enhance services to our customers and employees.



#### HISTORY HIGHLIGHTS

1994 FOUNDED IN ROSEMEAD, CALIFORNIA

1996 RELOCATED TO TUSTIN, CALIFORNIA

1998 INITIATED DEVELOPMENT OF INTELLITRAX OUR PROPRIETARY PROCESS FLOW MANAGEMENT SOFTWARE

1999 INCORPORATED AS A CALIFORNIA CORPORATION

2000 FORMALLY INTRODUCED INTELLITRAX FOR BETA PROGRAM

2001 CREATED QUALITY SYSTEMS FOR ATLAS INTERNATIONAL VAN LINES WHICH EARNED ISO ACCREDITATION

2002 AWARDED INTERNET AND INTRANET WEBSITE DESIGN AND DEVELOPMENT FOR TUSTIN UNIFIED SCHOOL DISTRICT



#### MANAGEMENT

#### Allan Browning - Chief Operating Officer

Allan brings Vision Quest more than 15 years of technological and management experience. Allan's educational credits include Pepperdine's School of Business and Management, Rio Hondo College - Business Administration, ITT Technical Institute for Electronic Engineering, Novell Certified Administration, Windows NT Systems Engineering, and advanced computer software and network training. Allan is a Dale Carnegie Graduate and Humanitarian Award Winner and a two-time Xerox Presidents Club Recipient and five time Xerox Quality Teamwork Day Award Recipient.

#### **Susan Browning - President**

Susan brings over 21 years of Management experience to Vision Quest. She is a Certified Moving Consultant (CMC) and a Registered International Mover (RIM), having met the rigid standards for these distinctions. Additionally, Susan received her degree from Rio Hondo College in Business Administration. Sue has successfully completed both the Dale Carnegie Management and Sales Courses.

#### **Bruce Bruns – Senior Software Developer**

Bruce earned a BA with Honors in Business Administration, with an emphasis in Finance, from California State University, Fullerton. Bruce brings more than 25 years of software development and code development to Vision Quest.



#### PRODUCTS

- 1. Design and deployment of ISO 9000-compliant Quality Systems designed exclusively by Vision Quest.
- 2. Design, sales, installation, and administration of network and computer technologies including:
  - Sales of Wide Area Network Connectivity and sales of DSL, VPN, Frame Relay, and T1-T3 connections as a Channel Partner with Concentric® Network Corporation.
  - Sales of Server and Workstation hardware as an authorized Hewlett Packard® Reseller
  - Sales of LAN and WAN connectivity hardware as an authorized 3COM® Reseller
- 3. Design, development, and sales of Workforce Automation Software solutions, which include:
  - IntelliTrax<sup>™</sup> This is our proprietary Software Solution currently designed for the Transportation Industry.
  - GoldMine<sup>™</sup> Sales Force Automation at its best. Vision Quest recently achieved Platinum Level Solutions Partner Status with GoldMine Software Corporation.
  - MAS 90<sup>™</sup> The worlds most popular Accounting Software Solution. Sage® Software Corporation who produces MAS 90 recently acquired Peachtree® Software making Sage the undisputed small to medium sized business Accounting Solutions provider.
- 4. Web hosting and design for Internet and Intranet Web Systems including Internet access through XO Communications.



#### ALLIES























#### COMPANY HIGHLIGHTS





# PROVEN QUALITY MANAGEMENT SYSTEMS



#### Feature Story

# Alexander's Moving & Storage has gained the coveted ISO 9002 Certification



After months of work and training, Alexander's Director of Quality and Customer Satisfaction, Alan Browning (eld), accepts the ISO 9022 certificate from Accept III Ontstopher Fondin, Accept is the aucting firm responsible for recommending certification to the ISO. Both the Balelinore and Tustin Alexander's passed their auctis the first time, with neither office receiving non-conformity—which is said to be a very impressive accomplishment.



Alexander's ISO Team in Tustin, California: (tront) Lori Schaeffer, Don Hill, Altan-Browning, Christophe Foncian (Accent); (back) Kristy Lemmerman, Gall Arm Lanch, Dawnelle Frakes, Joe Canaols and Strait Benkhe.

Pollowing a long period of hand work, effort and commitment, Alexander's Moving & Storage has gained the covertol ISO 9002 certification established by the International Organization for Standardization = a worldwide coulision promoting quality standards.

Alexander's is the first Atlas agent – and one of only a handful of full-service moving companies – to achieve the certification. The certification means that Alexander's is now internationally recognized as having a model for quality assurance.

Alexander's certification, which was awarded by ISO auditing computer Ascert, is unique in that most companies only certification encompasses everything Alexander's does as a service company.

"We had already undergone measurement under Atlas Van Lines' rigerous quality program and implemented our own formal quality process," states Alexander's President Don Hill. "Progression of our quality process made ISO certification the next logical step."

Alexander's assembled teams in Tustin and Baltimore under the direction of director of quality and customer satisfaction Allan Beowning. Beowning also prepared the offices for the arduous auditing process and acted as laison with Ascert, the auditing computs. The process required months of work and training.

ISO certification requires companies to establish and document quality criteria, then measure performance against the criteria and rectify any variances or non-conformance.

"I wasn't sure that a service company could attain the goal,



especially a moving company with all our intangible requirements," says Hill. "There are only about 8,600 ISO registered comparies in the U.S., and less than 15% are certified after the intral audic."

"But I knew if anybody could do it, we could."



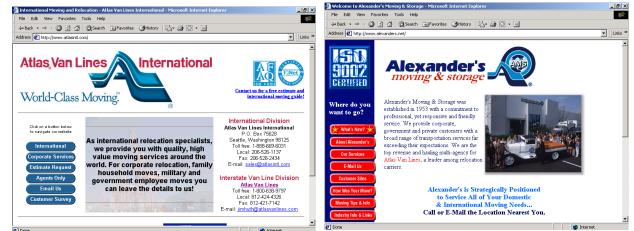


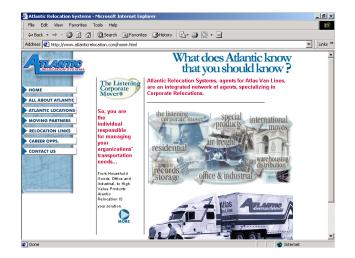
Alexander's ISO Team in Battimore, Maryland: Beth Midam, Jody May, Robby Burch, Amy Dubree and Arrie Schollian



# QUALITY MANAGEMENT SYSTEMS THAT WORK TIME AFTER TIME



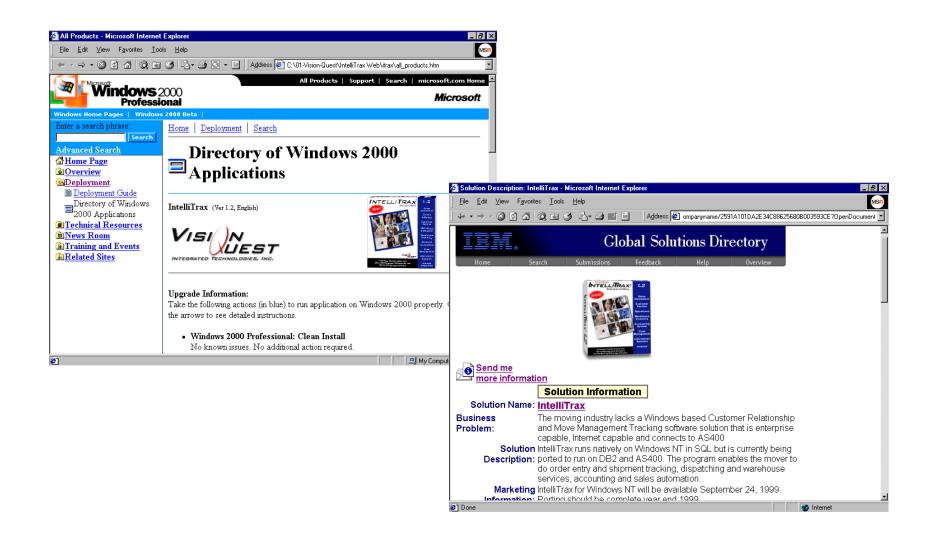








# INDUSTRY WIDE RESPECTED SOFTWARE





# TRUSTED TO DESIGN AND HOST LEADING ORGANIZATIONS' WEB SITES











# TRANSFORMING INSPIRATION INTO IMPLEMENTATION







# IMPLEMENTING AN ISO 9000:2000 COMPLIANT QUALITY MANAGEMENT SYSTEM

PROGRAM OVERVIEW





#### TQM vs ISO

#### The Focus

- The foundation of Quality is built upon Total Quality Management Not ISO.
- Customer Satisfaction, both internal and external, is the Benchmark.
- The effectiveness of a Quality System is directly proportional to the Commitment of Management.





# Management Philosophy

#### THE MANAGEMENT FUNCTIONS





## **Program Overview**

#### Planning

- Organizational Needs Assessment
- Leadership Development Training
- Quality Policy Development
- Vision, Mission, Goals, and Objectives

#### Organizing

- Create company Intranet
- Establish Departmentation
- Establish Job Division
- Identify differentiated tasks
- Implement Employee Handbook

#### Leading

- Establish hiring standards
- Set Expectations (Performance Assessment)
- Training and Coaching



# **Program Overview**

- Leading (continued)
  - Initiate process development
  - Motivate through recognition
- Controlling
  - Evaluate effectiveness of new processes
  - Ensure Document Control
  - Identify critical processes to metric
  - Create metrics for critical processes
  - Establish methods to adjust non-compliance
  - Internal Pre-Certification Audit
  - Auditing
    - Third Party Certification Audit



# <u>Planning</u>

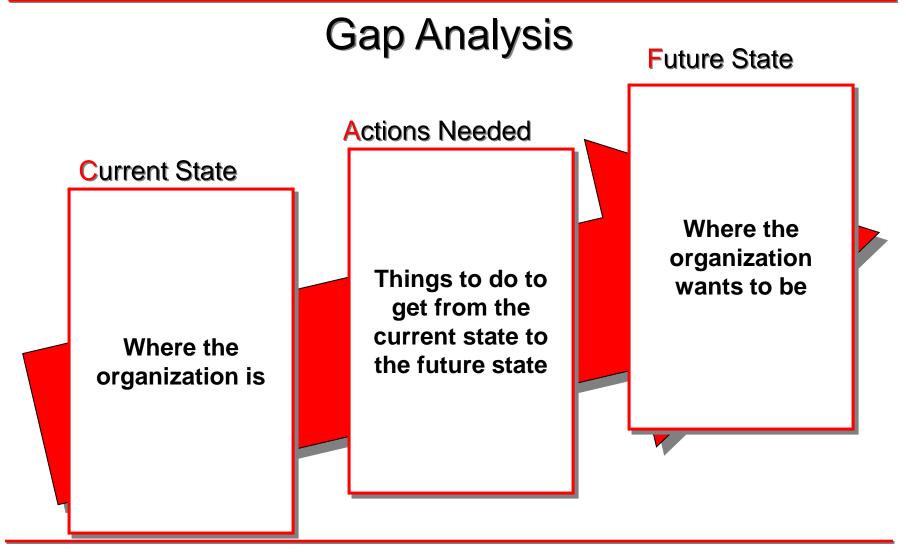
- Perform a needs assessment of the organization
- Implement a policy for quality and create a quality policy manual
- Deliver the leadership development training program
- Develop and implement a quality plan



#### **Needs Assessment**

Using a Gap Analysis the organization will perform an initial needs assessment. The Gap Analysis allows management to identify a future state of the organization, determine the current state of the organization, and then identify action items to move the organization from current state to future state.







# **Quality Policy**

A Quality Policy is a statement set forth by the organization which summarizes its philosophy of quality. The statement should be brief, meaningful, and directly impact the customer.



# **Quality Policy Manual**

The ISO 9000 Standards stipulate that the organization must create a Quality Policy Manual that defines the organization's commitment to quality. The Quality Policy Manual also stipulates senior management's roles and responsibility for ensuring the organizations compliance to the ISO Standards.



# **Quality Plan**

The Quality Plan defines the Vision, Mission, Goals, and Objectives that the organization will work towards achieving during the Quality System Implementation. The Quality Plan is the base line metric that the organization will use to measure its progress.



# <u>Organizing</u>

- Identify customer requirements and determine specific and quantifiable metrics which will become the standards for the organization
- Identify all of the specific regulatory standards required for the industry
- Create organizational structure and departmentation
- Establish departmental managers or supervisors
- Establish, document, and implement specific organizational processes whose output has quantifiable metrics
- Develop performance requirements based on quantifiable metrics







#### Management

The creative problem solving process of planning, organizing, leading and controlling an organization's resources to achieves its mission and objectives.



#### Mission Functions

Activities directly associated with accomplishing an organization's mission. These include planning, Organizing, Leading, and Controlling

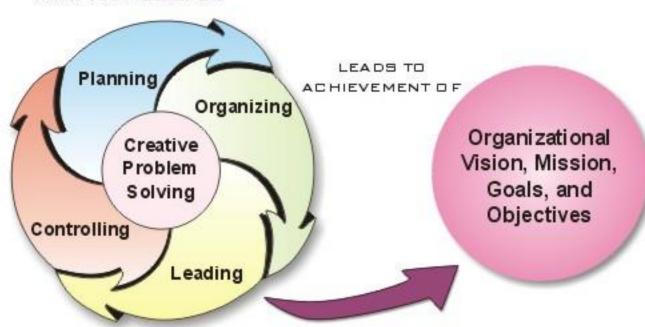






#### THE MANAGEMENT FUNCTIONS

WHAT MANAGERS DO





The Functions of Management

**Planning** 

Organizing

Leading

Controlling



Planning	Organizing	Leading	Controlling
Strategic Planning	Process Development	Leadership	MIS
Corporate Planning	Organizational Development	Motivation	Internal Control Development
Departmental Planning	Resource Identification	Morale Studies	Performance Appraisals
Sales Planning	Resource Development	Reward and Recognition Systems	Customer Satisfaction Surveys
		Pay for Performance	Systems Analysis



#### The Functions of Management

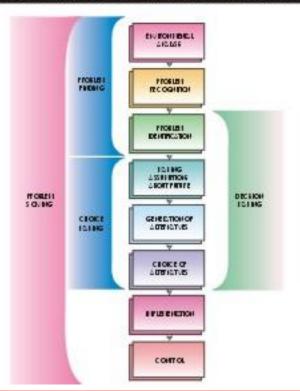
**Planning** 

**Organizing** 

Leading

Controlling

CREATIVE PROBLEM SOLVING PROCESS





#### Customer

Anyone that receives an output from any of your processes, both within the company and external to the company. Most employees of companies deal more often with internal customers rather than external customers. However, all processes eventually lead to the external customer.



#### Organizational Customer Identification



#### Organizational Customer Identification

Customer Call

Receptionist

Customer Service

Product Coordinator

Customer

**Delivery** 

Manufacturing

Accounting Accts. Rec.

**Customer** 

Accounting Billing



#### Organizational Customer Identification

Customer Call

Originator

Receptionist

Customer Service

Product Coordinator

Customer

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### Organizational Customer Identification

Customer Call



Receptionist

Customer Service

Product Coordinator

Originator

Customer Service Supplier

Customer

**Delivery** 

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Accounting Accts. Rec.

**Customer** 



### Organizational Customer Identification

Customer Call



Receptionist

Customer Service Supplier



Customer Service

Receptionist Customer Product Coordinator Supplier Product Coordinator

Customer

**Delivery** 

**Manufacturing** 

Accounting Accts. Rec.

Customer



### Organizational Customer Identification

#### Customer Call



#### Receptionist

Customer Service Supplier



## **Customer Service**

Receptionist Customer Product Coordinator Supplier



## Product Coordinator

Customer Service Customer Manufacturing Supplier



#### **Customer**

End User



#### **Delivery**

Manu. Customer Customer Supplier Accounting Supplier



#### Manufacturing

Product Coordinator Customer
Delivery Supplier



## Accounting Accts. Rec.

Customer's Customer



#### **Customer**

Acct. Customer / Accts. Rec Supplier



Delivery Customer / Customer Supplier



IMPLEMENTING AN ISO 9000:2000 COMPLIANT

QUALITY MANAGEMENT SYSTEM





## Organizational Process Connectivity (FLOW)

Customer Call

Receptionist

**Customer Service** 

Product Coordinator

Customer

**Delivery** 

**Manufacturing** 

Accounting Accts. Rec.

Customer



### Organizational Process Connectivity (FLOW)

Customer Call

--- Receptionist

**Customer Service** 

Product Coordinator

Customer

**Delivery** 

**Manufacturing** 

Accounting Accts. Rec.

Customer



## Organizational Process Connectivity (FLOW)

Customer Call ---- Receptionist ---- Customer Service

Product Coordinator

Customer

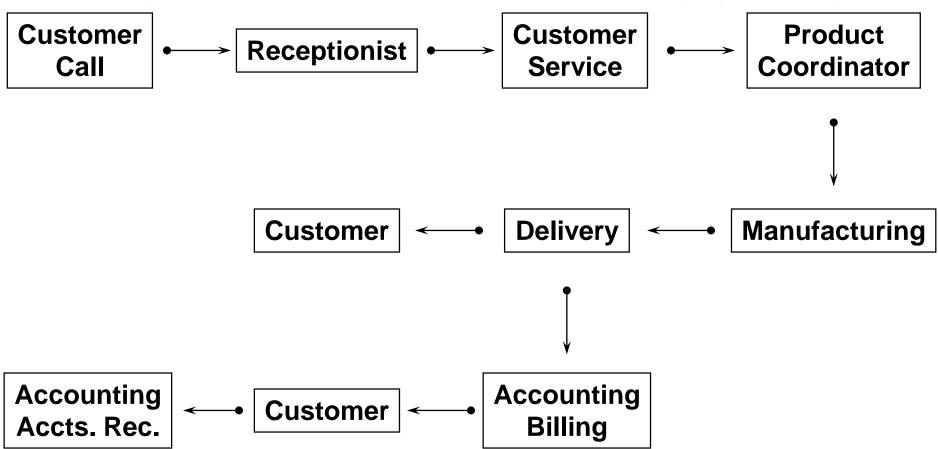
**Delivery** 

**Manufacturing** 

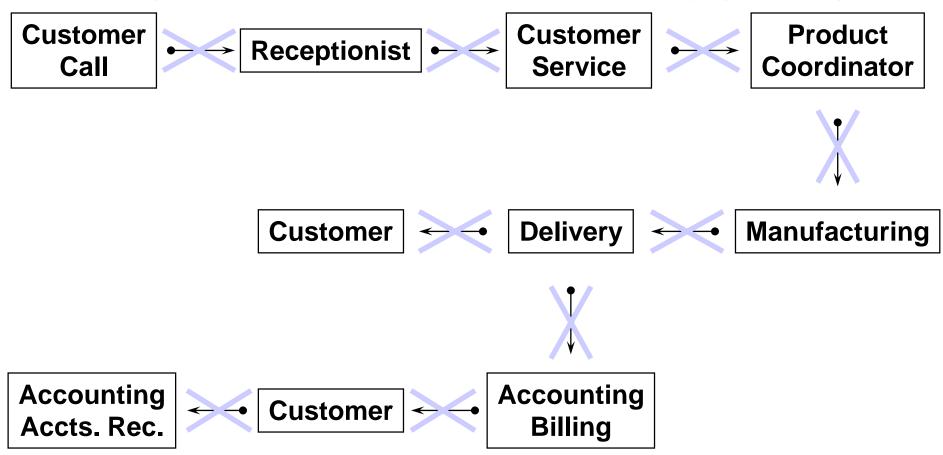
Accounting Accts. Rec.

Customer

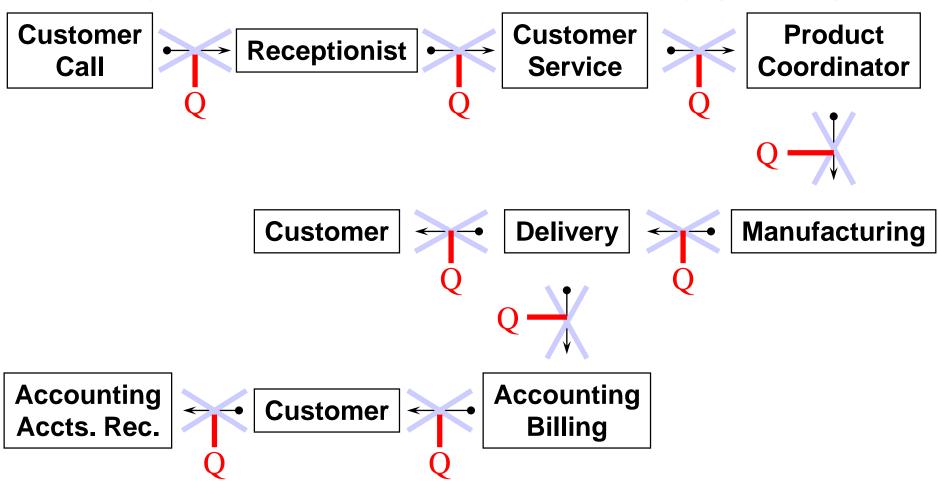




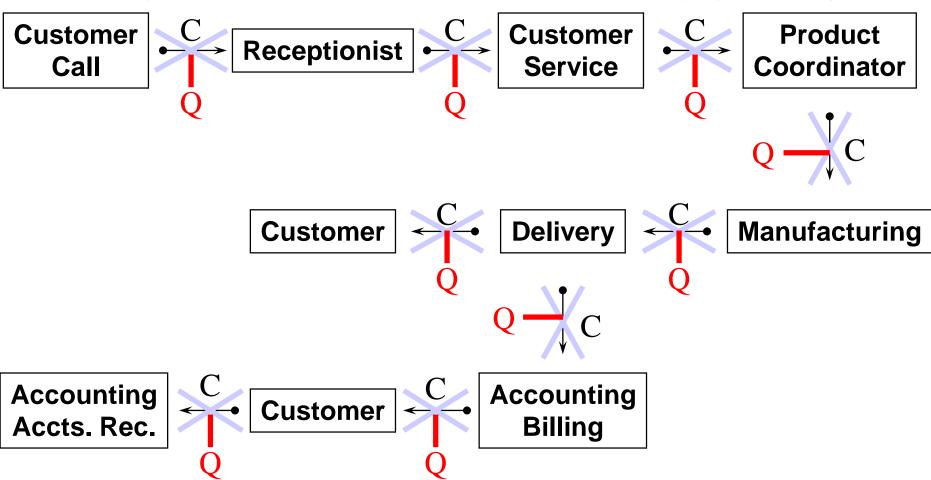














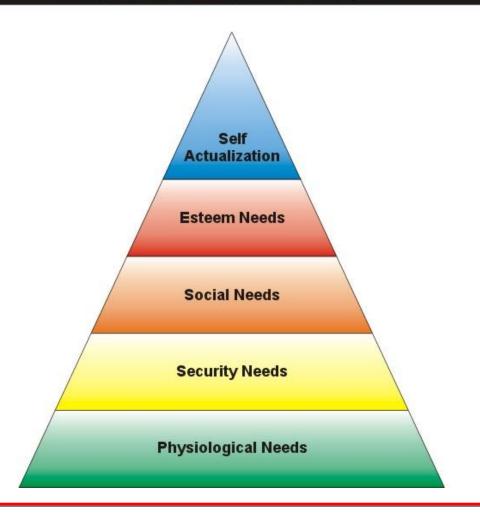
## Leading

- Develop human Resource Management
- Create and implement Employee Handbooks
- Instantiate and institute performance expectations
- Establish and perform regular performance reviews
- Develop and institute reward and recognition systems



## Leading

#### MASLOW'S HIERARCHY OF NEEDS





## Leading

#### Hawthorne Effect

#### Westinghouse Relay Assembly Study

An effect produced by a secondary factor, such as the attention given to the subjects, rather than by the factor under study.



- Process design and updates
- Statistical metric design and compliance
- Internal Auditing
- Technology solutions
- Intranet development



## **Process Obsessed**





#### Reasons We Use Written Processes

- To identify and meet customer expectations consistently
- To have the ability to measure process input
- To have the ability to measure process output
- Retain organizational core competencies
- To be able to cross train and retrain new and existing employees
- Processes tend to be the focus of quality inspectors



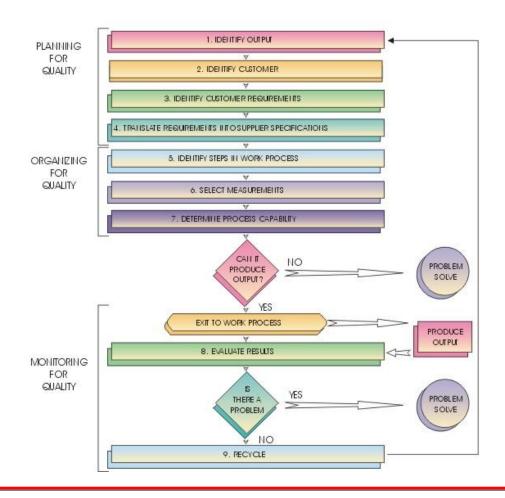
### Written Process Enablers

A written process gives us the clear understanding of the tasks requirements by providing us the following key elements.

- Knowing what the requirements of the customer are.
- Knowing what inputs we need to meet those customer requirements.
- Knowing what actions must be applied to the inputs in order to produce output.
- Being able to verify that correct inputs are being received.
- Being able to verify that correct output is being produced



#### QUALITY IMPROVEMENT PROCESS



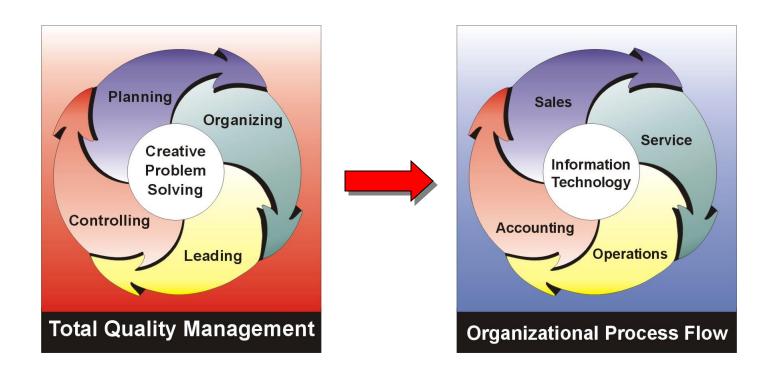


## **Auditing**

- Performance of In-system design Internal Audits
- Performance of pre-Accreditation Audit
- Application for Accreditation with selected registrar
- Walk the Accreditation 3<sup>rd</sup> Party Audit
- Assist with correcting any non-conformities
- Assist with Continuous Quality improvement



## Putting it All Together





## Strategic Planning Meeting

- Typically 2-3 Day Planning Session
- Highest levels of management must attend
- Recommend line management and potential managers to attend
- Planning should be for every segment of the organization
- Recommended to be off-site



## Leadership Development Training



This is typically a three-day training class. It is fast paced and interactive. It is recommended that this course be conducted off-site. An off-site location is preferred in order to optimize the focus of the participants. It reduces interruptions, it can be a recognition opportunity, and it allows for a break from the day-to-day.

The course is usually conducted Tuesday-Thursday, 8-5. However, in recognition of some organizations inability to allow all managers, supervisors, and candidates off-site for three business days the course can be modified to fit in a weekend time frame.

## Leadership Implementation

- Company Vision, Mission, Goals
- Development of Departmental Vision, mission, Goals
- Determining and setting performance expectations
- Development of Employee Handbooks
- Initial Performance Review and Expectation Setting
- Living Vision, Mission, Goals



## Organizational Quality Training





This is typically a two-day training class. It is fast paced and interactive. It is recommended that this course be conducted off-site. An off-site location is preferred in order to optimize the focus of the participants. It reduces interruptions, it can be a recognition opportunity, and it allows for a break from the day-to-day.

The course is usually conducted Tuesday-Wednesday and Thursday-Friday, 8-5. However, in recognition of some organizations inability to allow all managers, supervisors, and candidates off-site for three business days the course can be modified to fit in a weekend time frame.

Number of class participants should not be less than 10 nor exceed 20.



## **Process Development**

- Creation of Process Map
- Drafting of Processes
- Creation of Document Management System
- Implementation of Intranet (Optional)
- Deployment of Processes



## Coaching and Mentoring

- Participate in Departmental Meetings
- Participate in Quality Team Meetings
- Assist mangers
- Assist employees
- Start Internal Audit Familiarization



## **Auditing**

- Perform Internal Audit
- Register for Accreditation Audit
- Walk Accreditation Audit
- Assist with non-conformities (If any)



### Fees

Initial Needs Assessment and Program Planning Meeting	\$2,500.00
Quality Policy Manual Development	\$2,500.00
Quality Plan Development	\$2,500
3 Day Leadership Development Training Class	\$1,275.00 per student
2 Day Quality Tools Development Training Class	\$775.00 per student
Consulting Hours	\$175.00 per hour

Textbooks for use in all courses are included in the fees. All other printed materials will be billed separately.











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