



Your Business. **Elevated.**



Contents

About the Summit Companies	4-5
Our Team	6-7
What We Do	8-11

Your Business. **Elevated.**

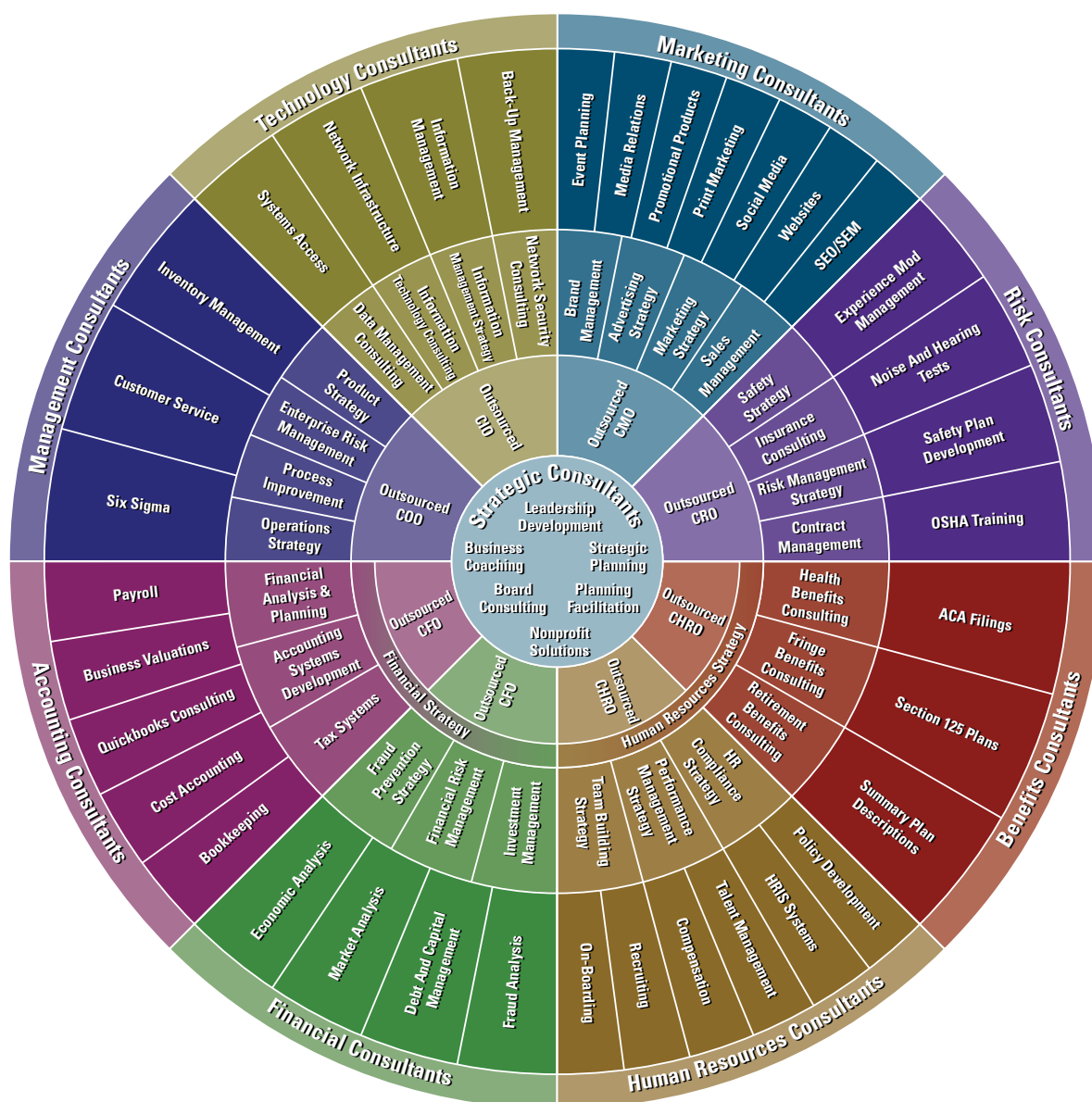
What would it be worth to your business or organization to have access to hundreds of years of experience across every aspect of business operations? What kind of impact could it have if your team could access some of the most powerful resources and programs being utilized today by organizations of any size? How would it affect your job as an owner, manager, or leader, if you could surround yourself with a team of professionals that could help you develop and execute the strategies that you need to take your organization to the next level? For most business leaders, these questions are only exercises in frustration, reminding them of dreams that are beyond their reach. At the Summit Companies, we are working to show businesses and nonprofits how they can finally find the answers to those questions and transform the way that they do business.



About Summit

The Summit Companies is a family of individual companies that work together to provide affordable and relevant strategic guidance and solutions to businesses and not-for-profit organizations. The structure of Summit is unique and has been tailored to be the needs of organizations in our market. Each individual company within the Summit family targets a unique area of business strategy, allowing that company and its team to provide focused

consulting and solutions where needed. Each company is further staffed by consultants and support staff with relevant business experience, training, and education in that field. In addition, the companies are further structured to be able to efficiently deliver comprehensive integrated solutions for clients who can benefit from guidance and support in more than one facet of business operations.



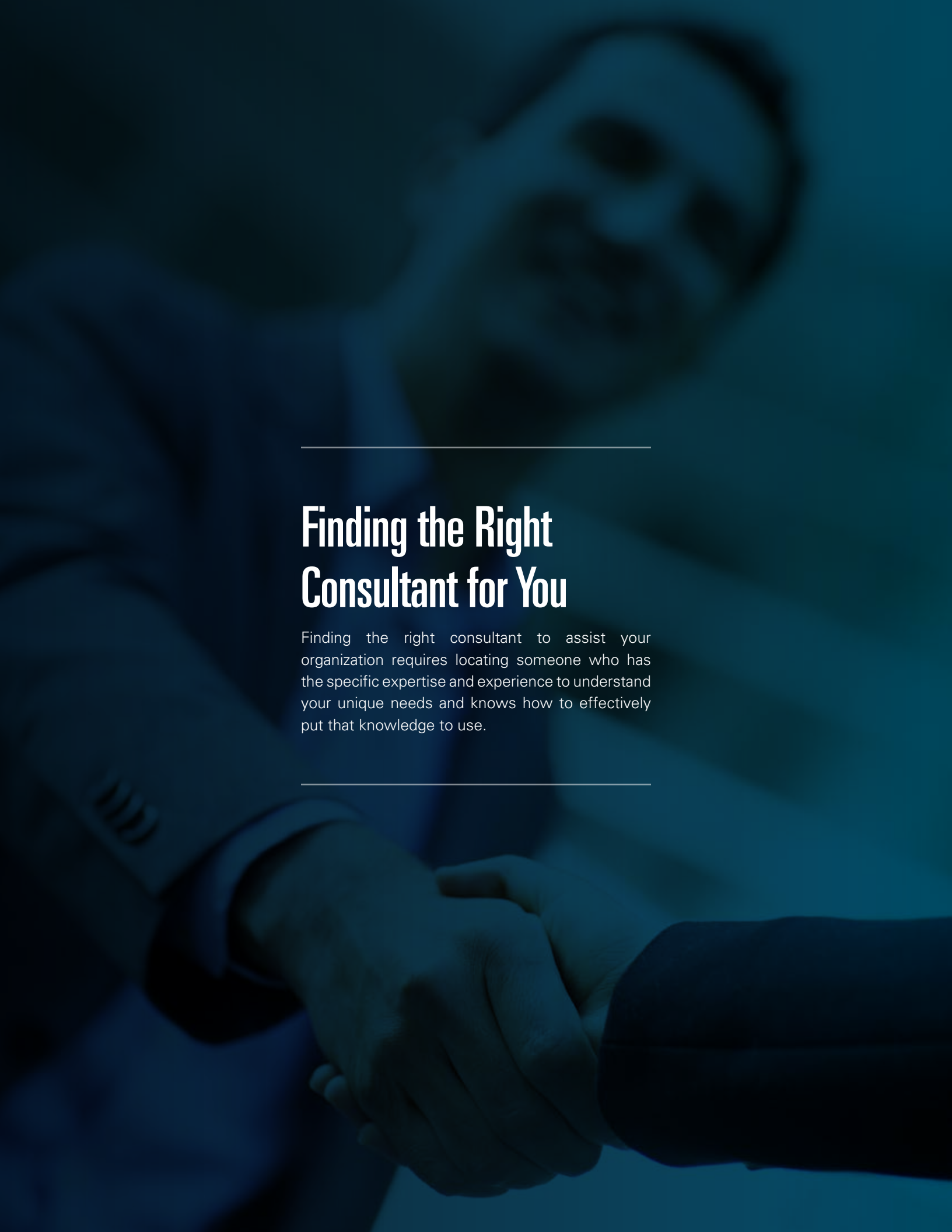


Since Summit was founded in 2005, we have grown from just one employee and single office to a team of over thirty consultants in four offices from Bristol to Knoxville. While much has changed during that time of exponential growth, much has also stayed the same. We strive to display the same commitment today of providing our hundreds of clients with value as we did when we had only a handful of clients. We also work hard to protect the values that we feel are at the core of our character and vision. Furthermore, we always

return to a mission that communicates our path of delivering a lasting impact in our community. Even as that mission has been clarified and updated over the years, the message is still consistent. Our mission is to provide strategies and solutions that help organizations reach their potential and to inspire and to educate communities to meet the needs of their people while providing a fulfilling and rewarding experience to qualified and servant-minded professionals.

Finding the Right Consultant for You

Finding the right consultant to assist your organization requires locating someone who has the specific expertise and experience to understand your unique needs and knows how to effectively put that knowledge to use.



Our Team

The true strength of The Summit Companies is our exceptional team of consultants. Summit is proud to have assembled a team that individually and collectively has the expertise, knowledge, and resources necessary to help your organization achieve its true potential.

Technical Expertise

Summit consultants have some of the most respected certifications available across a variety of industries. Those certifications include Certified Public Accountant (CPA), Senior Professional of Human Resources (SPHR), Certified Risk Manager (CRM), Chartered Global Management Accountant (CGMA), Certified Insurance Counselor (CIC), and Certified Safety Professional (CSP.) In addition to industry certifications, our consultants are also trained and certified in a variety of programs and resources that are popular among business owners, including all versions of QuickBooks. Summit consultants also have a variety of advanced degrees, including both Master's and Doctorate degrees, in a number of areas.

Practical Experience

Technical expertise alone, however, is not enough to maximize an organization's potential. That requires the experience that can only come with years of practice in applying business principles in the real world. Our consultants come from a wide range of industries but have in common the knowledge that comes from extensive experience. The diversity of backgrounds of our consultants provides a valued resource of first-hand experience as our team helps to design practical solutions for your organization.

Commitment to Excellence

Summit consultants also share in common a passion for continual improvement in order to provide the best results to our clients. That includes commitments to continuing education, developing

new technical knowledge, and to always striving to improve our ability to meet your needs. Summit consultants believe in providing principled direction and working with you to uphold the values of your organization.

"When you choose to work with a Summit consultant, you are working with an individual who has made a commitment to exhibiting the highest levels of professional integrity, and Summit is committed to ensuring that is upheld."

Working as a Team

Having a team of consultants work on its behalf can offer unique benefits to an organization. However, business owners often hesitate to bring on multiple individuals without knowing if they will be able to support each other or detract from each other. Summit offers businesses the opportunity to work with a team of consultants that knows how to support and balance each other to deliver the best value to your business.



What We Do

As a strategic consulting firm, Summit works with you and your organization to help you realize your vision. The services that we provide differ from one company to another, because no two companies are exactly alike and their visions are as varied as the dreams and personalities of their owners. What is common to every engagement is the value that we strive to provide to our clients. Our goal is to provide every business or organization, regardless of the size, with the experience, knowledge, and resources to be able to maximize their potential.

At Summit, strategy is our first priority. For a business or nonprofit organization, a strategy is the blueprint or roadmap for what the organization needs to do and where it needs to go to realize its potential. If you don't know what those steps are, then you will tend to miss opportunities and waste resources. However, many organizations lack the proper strategy because they don't have the experience and resources to put it together.

That can lead to unanswered questions related to what the organization needs to do as a whole, or related to specific areas, such as Finance, Human Resources, Marketing, Risk Management, Technology, or many others. Summit can fill those gaps by giving you access to a professional or a team that can help answer those questions and determine what needs to be done by whom. Developing the proper strategy and plan, however, only gets you part of the way. You also need to be able to access the right solutions, and that is why Summit doesn't stop there. Whether Summit can provide those solutions through one of our member companies, or whether you would be better served by another outside organization, we will work to ensure that you have options available from which to choose to see your plan through to fruition. The following programs are just a small sampling of the ways that we can help your organization realize its vision.

“Summit can offer a variety of types and levels of strategic planning services, tailored to meet the specific needs and situation of your organization.”

Strategic Planning

Strategic planning is one of the most universal and foundational elements of organizational performance. While the term often conjures up images of fanciful statements and thick documents which are rarely used, strategic planning has the potential to have a significant and long-lasting impact on the organization when it is done well. Summit’s Strategic Planning model is unique in its structure and focus. Over years of study, experience, and testing, our team has developed a framework that can allow organizations of any size and type to be able to focus on the planning areas that are the most relevant and crucial to their organization. Summit can offer a variety of types and levels of strategic planning services, tailored to meet the specific needs and situation of your organization. These services include:

- Plan development
- Facilitation services
- Plan execution
- Software selection and implementation
- Key Performance Indicator tracking and dashboard development
- Plan document design and communication

Outsourced Executive Services

Experienced leadership and guidance is one of the most important needs for any size or type of organization. Large organizations help meet that need by making large investments in high level staff, but most organizations find that it is either not feasible or cost-effective to hire in-house staff that can provide all of the expertise that the organization needs. Outsourced Executive

programs, also known as Executive-as-a-Service or Fractional Executive programs can be the answer. These programs allow an organization to have access to the needed strategic expertise and experience at a fraction of the cost of a full-time staff member. Through the Outsourced Executive Program, Summit can provide small and mid-sized businesses and nonprofit organizations with exactly the strategic knowledge and resources that they need. Available Outsourced Executive services include:

- Chief Executive Officer
- Chief Operating Officer
- Chief Financial Officer
- Chief Human Resources Officer
- Chief Marketing Officer
- Chief Information Officer
- Chief Risk Officer

Business Continuity Program

While almost all business owners want their organization to be able to survive and thrive for the long-term, few actually have the resources and plans in place to allow their businesses to be able to succeed after new leadership takes over. When an owner decides that is time to sell the business or hand it over to a new generation of leaders, many challenges can prevent that transition from going as smoothly as the business needs. Even worse, when an unplanned transition takes place, such as the death of the original owner, the odds of success are even less likely, meaning that it will be likely that very little of the business or its original value will be left for the benefit of those who were left behind. Summit’s Business Continuity Program can help

any business or organization be better prepared for both possibilities. This allows a business owner to not only put a plan in place for retirement or a reduced role, but also have a contingency in place in case the unexpected occurs.

Advisory Board

The Board of Directors is the ultimate source of business guidance and governance for large organizations, hopefully ensuring that the organization has the necessary strategic expertise in place to protect all of the stakeholders. An effective Board can be the difference between success and failure for many businesses, drawing on the expertise of professionals from different background with complementary areas of knowledge and skill to make informed decisions for all areas of the business. Very few small businesses have access to such a resource, however, despite the fact that they need such guidance and knowledge just as much. The Summit Advisory Board program helps fill that gap, by allowing a small business to compile a Board from Summit professionals that can get to know the business and meet with the owner or manager on a regular basis to provide feedback and guidance in every area of the business.

Business Training

In addition to providing consulting services to both businesses and not-for-profit organizations, Summit also provides a number of training opportunities delivered in a group setting for professionals and leaders who are interested in learning general

information on selected topics. These trainings are available at set times and locations throughout the year, but specialized training opportunities can also be provided to groups upon request. Regardless of the format, location, or target audience, all training opportunities are structured to deliver valuable and relevant information to business owners. Since the training solutions mirror our consulting model, our approach also allows for all training courses to be focused on the most common challenges and opportunities that businesses and nonprofit organizations experience. Available training topics include:

- Employee Motivation
- Compensation
- Strategy Development
- Employment Law Compliance
- Policy Development
- Brand Development
- Social Media
- Budgeting and Cash Flow
- Financial Reporting

Business Solutions

Due to the diversity of our team and the range of solutions that they offer, it is impossible to fully cover the breadth of what Summit can do in a short list of services. Instead, we encourage organizations to simply consider the struggles, frustrations, and missed opportunities that they have experienced, and then invite us to show you how we might be able to address and meet those needs.

Whether your needs are related to Finance, Marketing, Human Resources, Operations, or Strategy, it is likely that we have the people, resources, and solutions that you need. Please let us know how we can serve you.



thesummitweb.com

p: 866.435.0268

f: 866.620.4762

Corporate

1241 Volunteer Pkwy
Ste 100
Bristol, TN 37620

Asheville

37 Haywood St.
Ste 200
Asheville, NC 28801

Johnson City

4451 N Roan St.
Ste 205
Johnson City, TN 37604

Kingsport

1880 N. Eastman Rd.
Ste 130
Kingsport, TN 37664

Knoxville

9111 Cross Park Dr.
Ste D200
Knoxville, TN 37923