

ENVISION QUARTERLY

The Official Quarterly Newsletter of Envisiongroup International



envisiongroup
International

ENVISION NEW FOR 2021

CAPITAL SOURCING

Envision is pleased to offer support through our capital sourcing partner, Fieldstone Partners (www.fieldstone.com). Fieldstone has many years of experience and deep relationships across various capital sources - from family offices to large institutional lenders.

Together, Fieldstone and Envision work to assess our clients' appropriate financial needs and strive to secure the appropriate funds in a manner most friendly to ownership. Our shared experience allows us to skillfully guide entrepreneurs through the often-complex financing process and advise them on potential pitfalls.

Capital sources may include:

- Small and large family offices
- Mezzanine Funding (through carefully structured subordinated debt)
- Traditional Senior Debt and "Stretch Senior"
- Asset-Based Loan (ABL) Financing
- Private Equity Funding
- Venture Capital Funding

WHAT'S IN OUR LATEST ISSUE:

Capital Sourcing
Strategy Consulting
New Workshops
ESG
DE&I



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STRATEGY CONSULTING

Envision assists clients in constructing and executing growth strategies, both organic and through acquisitions, to complement our buy-side advisory services. Our focus is on assessing core capabilities and mapping how those can be extended both internally and externally. We also assist new firms in business plan development, and work with both new and existing firms in developing marketing strategies and sales campaigns. Our strategic consulting focus includes:

- Strategic Business Plan Development
- Portfolio Optimization
- Market Segmentation and Profit Pool Assessments
- Technology Commercialization Strategies
- Joint Venture Strategies
- Sales and Marketing Campaigns
- Project Feasibility Assessments



STRATEGY ALIGNMENT AND TRAINING

We know every organization has more potential than it is currently delivering, and our disciplined processes and unique outside perspective will help executive decision-makers fulfill their aspirations and achieve their potential.

If you are thinking about how you might improve the effectiveness of your organization, create and implement a strategic plan; call us so we can show you how we would approach your specific needs and describe a process that will focus on results and goal achievement.

A summary of services for which we are often engaged to include:

- Creating or validating an organizations Vision, Mission, and Values
- Development of Company Pillars & Strategic Goals
- Creation of Company or Business unit Objectives
- Establishment of Measurement & Targets
- Roll-out and Communication of Objectives

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NEW WORKSHOPS FOR 2021

Envisiongroup offers innovative interactive training. All training is developed following adult-learning best practices and delivered virtually or in-person using materials, tools, and templates for easy application and use, allowing for personal action planning and seamless integration into your daily work to enhance sustainability.

ENVIRONMENTAL, SOCIAL, AND GOVERNANCE (ESG)

The pandemic has intensified the significance of ESG issues. Stakeholders need greater transparency in managing their ESG risks and integrating them into their business strategy.

Many ESG reporting initiatives have surfaced from various sources, resulting in a hodgepodge of methodologies and confusion in the marketplace. Many have gained support. However, there has been no consistent, widespread adoption of these approaches.

ESG issues play a significant role in an organization's ability to create value. Seeing your organization through an ESG lens helps recognize the impact of non-financial issues that will have a material financial impact on your organization's value.

ESG metrics can help your businesses recognize and detect which systems may be related to future risk and how they may be turned into competitive advantage opportunities. When you reassure your investors that your company is thinking ahead, they will continue to invest in you.

The purpose of the ESG Certificate training is to further deepen the participants' understanding of ESG issues, understand in more detail the strategy of each participant's firm, and develop a personal ESG leadership action plan tied to that strategy.

DIVERSITY EQUITY AND INCLUSION (DE&I)

Social factors like diversity, equity, and inclusion play an important role in the health and well-being of your workforce - and its productivity. DE&I is more than policies, programs, or headcounts. Equitable companies surpass their competitors by acknowledging the unique needs, perspectives, and potential of all their team members, resulting in deeper trust and more commitment from their employees.

This program uses the unique experiences of relatable individuals to explore key concepts such as identity, power, privilege, communication, and provides practical strategies to use to create a more accepting workplace.

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