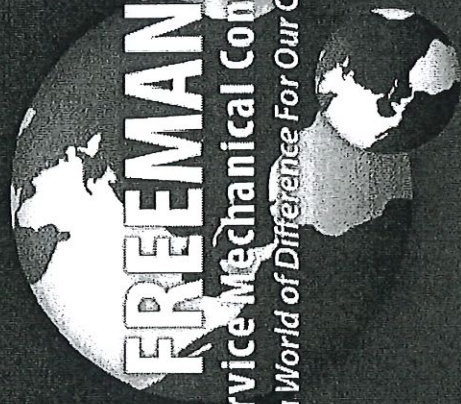


City of Milwaukee Office of Small Business Development Business Capacity Building Program

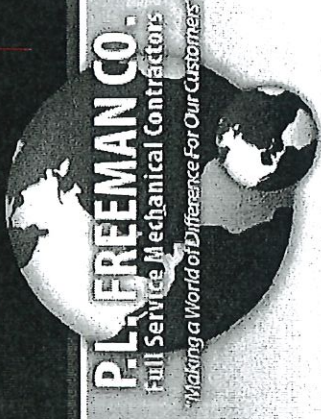


P.L. FREEMAN CO.

Full Service Mechanical Contractors

"Making a World of Difference For Our Customers"

Ex. D



THANK YOU

- City of Milwaukee Office of Small Business Development – Ossie Kendrix & Rayna Andrews
- Mandel Group
- Ray Hintz LLC and Mentor Quality Heating of Brookfield
- Program Administrator -Genyne L. Edwards of WOO connections
- Gayle Peay – Denine Powell and Brent Oglesby
- Don and Kate Hill of Hartland Information Research
- Business Coach – Cuauhtémoc Rodriguez of AtVantage Business Consultants
- Personal Coach – Sandy Browne of Wade Awake Inc.
- Fellow Program Participants- JCP Construction-Maures Development and Ranson Construction
- Numerous Guest Speakers and Manpower Inc.



MY EXPECTATIONS

Mentor-Protégé Agreement & North End Business Capacity Building Program

1. Project Participation

- Design to Estimating to Project Management and Project Installation
- Growth and Development of Design Build Division
- Increase Business Capacity
- Strengthen Project Resume

2. Business Capacity Training Program

- Fear of the Unknown
- Terms like Coaching, Consulting- Somewhat Abstract Terms
- Contractors - "World of Tangibles"
- Estimate- Manage- Execute- Perform- Chase Receivables

3. Tangible Program Deliverables

- Business Plan
- Network
- Build New Relationships
- Strengthen Current Ones

BUSINESS COACHING

DEFINITION OF COACHING

1. What is Business Coaching?

- Terms like Coaching, Consulting- Somewhat Abstract Terms

2. Handout at Monthly Session Defined Coaching

- Coaching is patterning with Clients in a thought provoking and creative process
- Increases their awareness, enhances their ability to solve problems and inspires them to maximize their personal and professional help.

3. Handout Clarified the Role of the Coach

- Coach role is to help me manage myself, and to assist me in setting a new direction
- The coach examines the situation, helps me create a plan of action, and works side by side to resolve the issue
- Coach does not have the answers, they have the questions that lead to me finding my own answer
- Coach supports me in terms of drawing on my own wisdom and following my own inner guidance



BUSINESS COACHING

HOW HAVE I BENEFITED?

1. General Way

- Temo helped me discover my blind spots in terms of how looked at a situation
- Helped me see a problem differently
- Helped me see in what ways I was not acting in harmony with my goals
- Helped me see how to unlock my potential

A. Listened Intently

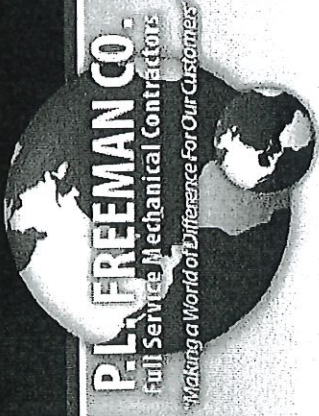
- What I Said
- What I Tried To Say
- What I Did Not Say

B. Shared

- Temo shared his ideas, comments and views on the challenges and dilemma I faced

C. Suggests

- Temo 3 steps ahead of me.
- Gave me practical suggestions and gave me homework assignments
- Helped me to see the importance of taking the time to “step back and take a big picture look of my firm.



BUSINESS COACHING

HOW HAVE I BENEFITED?

2. Specific Ways

Problem: Time Management -Organization

- Needed to Manager Time Better on A Daily Basis
- Needed to Improve in Terms of Overall Organization
- Self Discipline

Solutions:

- Brian Tracy- U-Tube Presentation- Power Of Self Discipline
- Time Management and Appointment Tools- Use Of Outlook-Calendar Appointments- Contacts-I Cloud-Syncing Emails into Folders

PERSONAL AND BUSINESS ACTION PLAN

1. Clear Thinking-

- Take Time Each Day to think and pray, before making decisions
- Think On Paper

2.Daily Goal Setting

- Write Down Goals in the Personal Tense at least 10, each day



BUSINESS COACHING

PERSONAL AND BUSINESS ACTION PLAN

3. Daily Time Management and Planning

- One Minute of Planning Save 10 Minutes of Execution
- Make List of Things to Do Each Day- At Night- Prioritize List A task –B-Task C-Task D Task(Delegate)
- Set Time Limits for Certain Tasks

4. Discipline of Courage

- Fear of Failure and fear of Risk
- Fear of Being the “Prime Contractor” or “Increasing Bonding Capacity”
- Confront the Fear-Seek to Be Prime Contractor on Projects

5. Discipline of Better Health Habits

- Design Ideal Body- Make A List of Ideal Weight, Height
- Eat Less ,Daily Exercise- We Walk 3 Miles A Day
- Start at 5:30 am No Salts-Sugars-Flour-No Soda – Eat Proteins-Salads



BUSINESS COACHING

PERSONAL AND BUSINESS ACTION PLAN

6. Regular Saving and Investing

- Avoid Debt – Try to Say Business and Personally
- Living Under Ones Means
- Never Buy A New Car 2 Years Old Best Idea
- Investigate before Investing- Things U know and Understand-Don't

7 .Discipline of Hard Work.

- Don't Waste Time At Work- *"When At Work- Work"*
- Avoid Useless Conversations, Surfing the Internet-
- Start Day Earlier- Eat At Desk- Save 1 Hour During Lunch

8. Continuous Learning

- Read More and Written Books-Audio CD's Tapes Etc.
- Business Journals-Religious

9. Discipline of Self Persistence

- Drive to Complete Task 100%
- Persist to Complete the Task



BUSINESS COACHING

OTHER BENEFITS

Components of Business Plan

Marketing Plan

- Coached Me through Writing Key Components of the Business Plan
- I was Actively Involved in Personally writing key parts of my business plan
- Completed Action Plan and Goal Setting Exercise

Marketing Milestones In Live Plan

- Installed Key parts of our Goal Setting Exercise and Highlighted them as Project Milestones in Live Plan

Succession and Short-term Planning

- Discussed Key Components of a Succession Plan
- Friends, Family, Employees and etc.
- Do we want to sell business or use business as lifestyle vehicle to accomplish short and long-term goals, i.e.. Retirement,
- Where do we want to be in 5 years in terms of growth, and additional staff to accommodate the anticipated growth

PERSONAL COACHING

HOW HAVE I BENEFITED?

My Leadership Skills

- Discussed how I view situations, employees, and potential problems
- Discussed perception vs. the reality of a situation
- How I view my staff? Just employees or as a key component of our success

Values

- Values Clarification Exercise- Examined my personal values and how they relate to how I view and run my business and how I live my life

DEVELOPMENT OF KEY CORE VALUES AND PRINCIPLES

- **Faith-** Faith in Jehovah- Faith in Family and Friends
- **Family** – Next to Jehovah God, Family comes First
- **Focus-** Focus on the things that are important each day at the right amount in terms of priority
- **Forward-Forward** Thinking and Action- Learn from past mistakes
- **Future-** The present lays the groundwork for a happy future.



PERSONAL COACHING

HOW HAVE WE BENEFITED?

Our Employees

A. Renewed Effort From Energized Employees.

- As I attempt to incorporate the new leadership methods, learned from Sandye.
- Better Morale Among Staff.
- Maximized their potential
- Capitalize on Employee Strengths
- Improve on their Weaknesses
- Greater Sense of Teamwork.
- Greater staff buy-in
- Improved Staff Meetings

MONTHLY SESSIONS

HOW HAVE I BENEFITED?

Action Learning – Gayle Peay

- Group “Think Tank” Approach Among Program Participants
- “Human Capital Plan” - “Who’s On Our Bus”
- Action Learning Inquiry- Series of thought provoking Questions
- We Developed a List of Duties and Responsibilities for Each Staff Member

Business Model Generation- Matt Richardson Smart Wave

- Helped me examine the rationale of how we as an organization create, delivers and captures value.
- Exercise where I examined the 9 Basic Building Blocks of our Business Model
- Lean Methods For New Business Models- 5 Step Process
- Exercise on the White Board



MONTHLY SESSIONS

HOW HAVE WE BENEFITED?

Financial and Capital Management-Farshad Maltes WHEDA

- Provided Information in Regards to Large and Small Development Projects
- Types of Funding Resources Available to Developers
- Information on how Business Capacity Program Participants might collectively submit a proposal for funding

Trends in Sourcing Construction Supplier & Diverse Business Relationships-Kimberly Casey

- Contract Bundling
- Joint Ventures /Teaming Agreements
- Mentor-Protégé Programs
- E-Marketing Strategies

MANAGEMENT FLOW CHART & FUTURE POSITIONS

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Prentice L. Freeman Jr., President
Chief Operations Manager

Thomas Tobin
CPA

Jason R. Freeman
Texas Operations Manager

Michelle K. Freeman
Administrative Assistant

Prentice L. Freeman Jr.
Project Manager

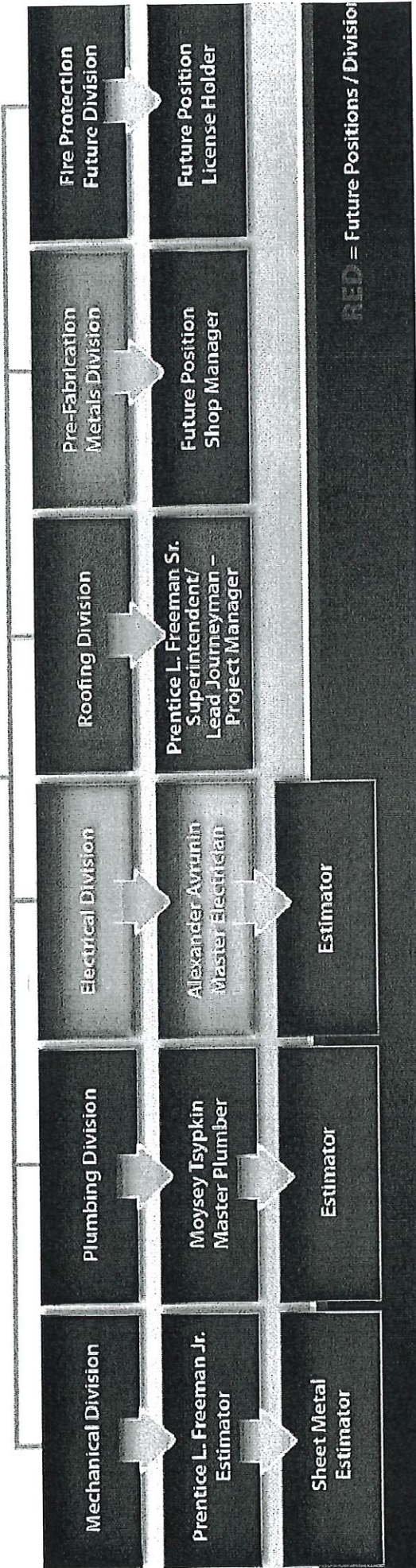
Prentice L. Freeman Sr.
Safety Director

Marko V. Lee
Fleet Operations
Manager

Future Position
Auto CAD/BIM
Designer

Bobby Jones
Tool Shop Manager

Future Position
Project Manager



RED = Future Positions / Divisions



HOW HAVE I BENEFITED?

Deneine Powell-Lily & Hampton Consulting

- Kept us engaged in the Business Plan Process
- Productive Interviews
- Challenged me to think "Outside the Box"
- Gave me homework assignments in terms of the "SWOT Analysis" and the Marketing Portion"
- **Live Plan** a valuable Resource
- Set Marketing Milestones in Plan to Keep me focused



STRATEGIC ALLIANCES

TRADE PARTNERS

Implementation of Policies of Larger Firms

- Safety Policy-Safety Video- and Safety Manuals –Vehicle Policy Manuals
- Safety Meetings Weekly Tool Box Talks
- On-Site MSDS Sheets
- Employee Manuals-Company Policies

Imaging and Branding

- T-Shirts, Badges, Hard Hats-Jackets
- Vehicles- Have QR Readers

Expansion

- Larger Office in March 2013
- 600 Sq. Ft of Office and 1600 of Pre-Fabrication Space



STRATEGIC ALLIANCES

GROWTH WITH TRADE PARTNERS

Fellow Mechanical Contractors

- Teaming Agreements- JV Agreements –Subcontractor Agreements
- Mentor-Protégé Agreements
- Analogy of Fishing

HOW HAVE WE BENEFITED ALLIANCES?

- Tied to An Actual Project- Allows You to Implement Many of Things Learned on the Project.
- Increased Revenue

Implementation of Technology and Practices of Larger Firms

- Foundation Accounting-Job Costing –Payroll-Project Management Software
- Giaga-Trak Tool Tracking Software
- Ring Central VOIP Phone System
- Dedicated Server
- Fast-Est. Mechanical Estimating Software- On Screen Take-Offs
- Connect to Car GPS Vehicle Fleet Management
- Plotter and High-Speed Copier



STRATEGIC ALLIANCES

DEEPEN RELATIONSHIPS WITH TRADE PARTNERS

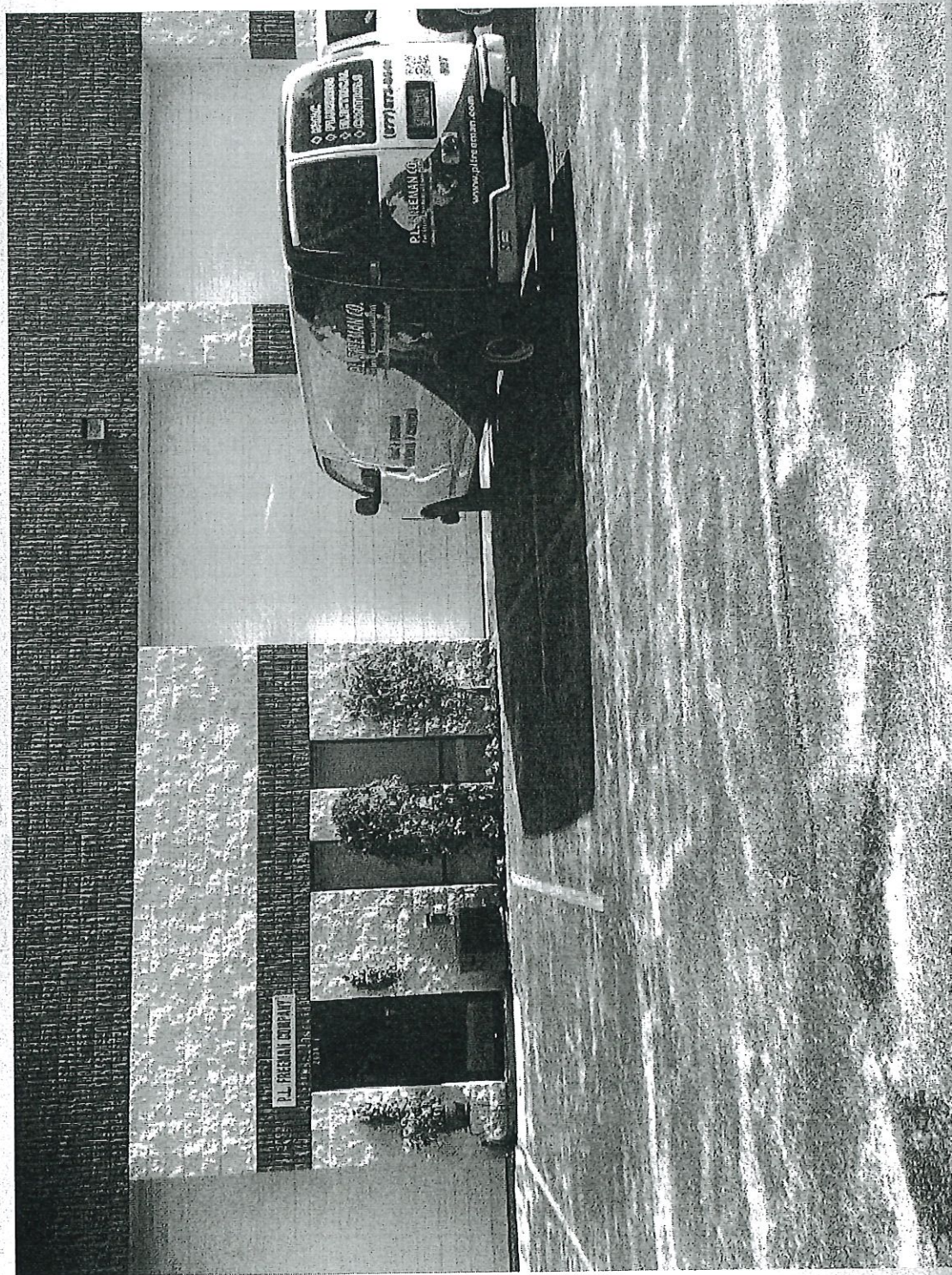
Being a Better Company Makes Us A Better Partner

- *Develop Satisfaction Surveys for a Better Dialogue*
- *Stay in Front of Customers and Fellow Trade Partners, Newsletters and Such*
- *Thank You Cards -*

CHANGE DYNAMIC OF RELATIONSHIP

- Aggressive Projected Revenue Goals
- Look To Be Prime Contractor 100% is better than 20%
- Look to Get Higher OHP Split

QUESTIONS?

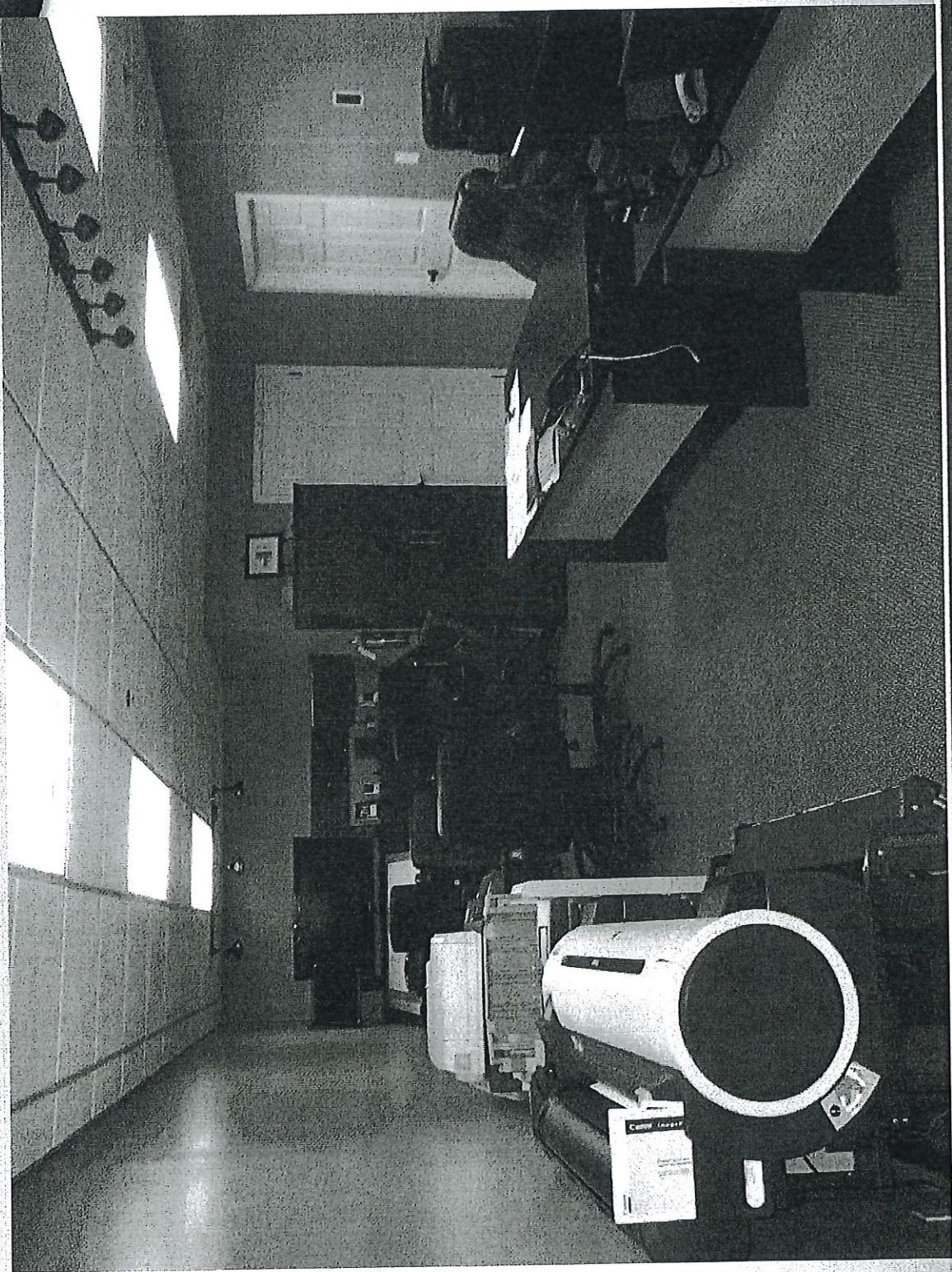




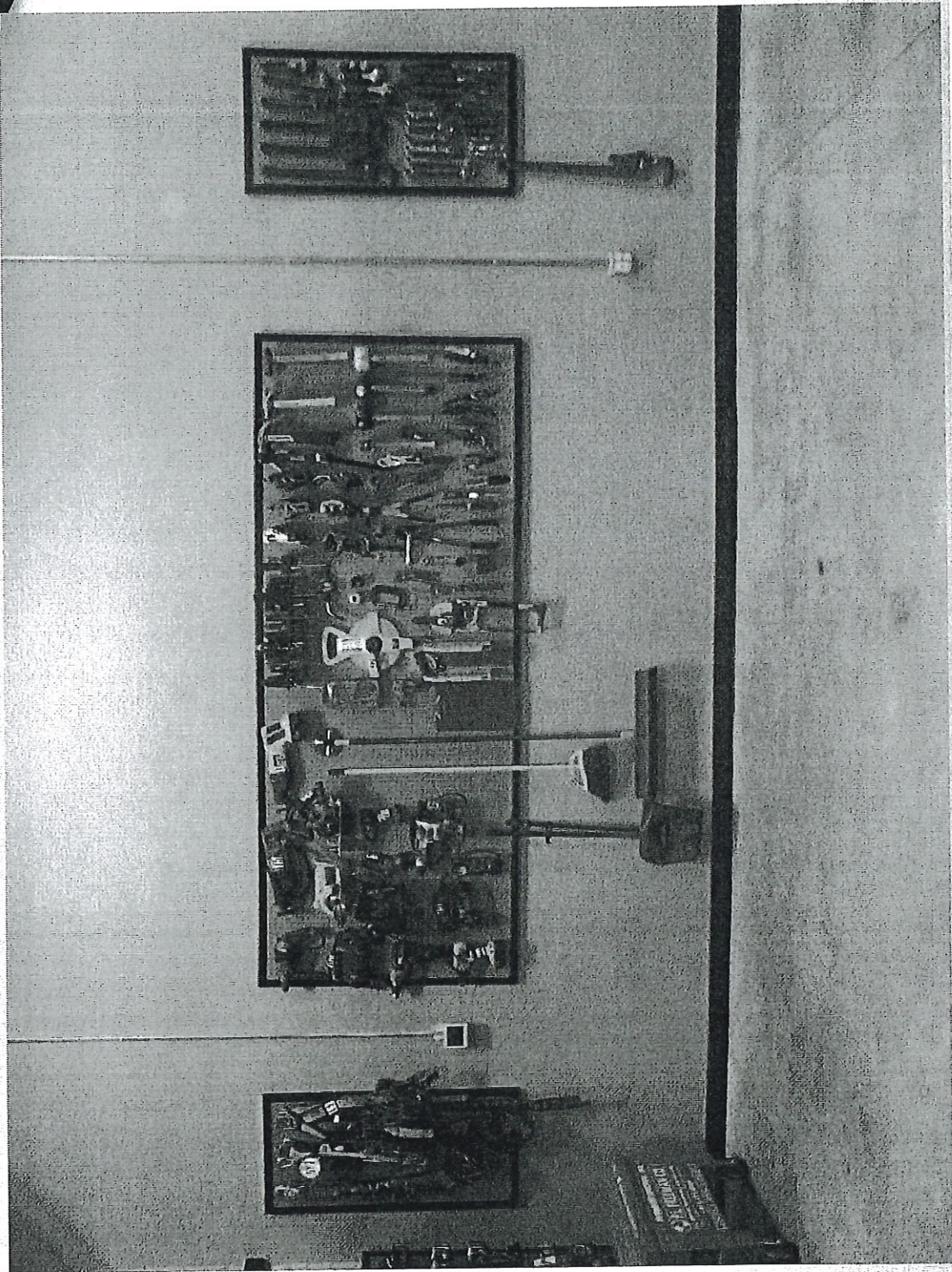
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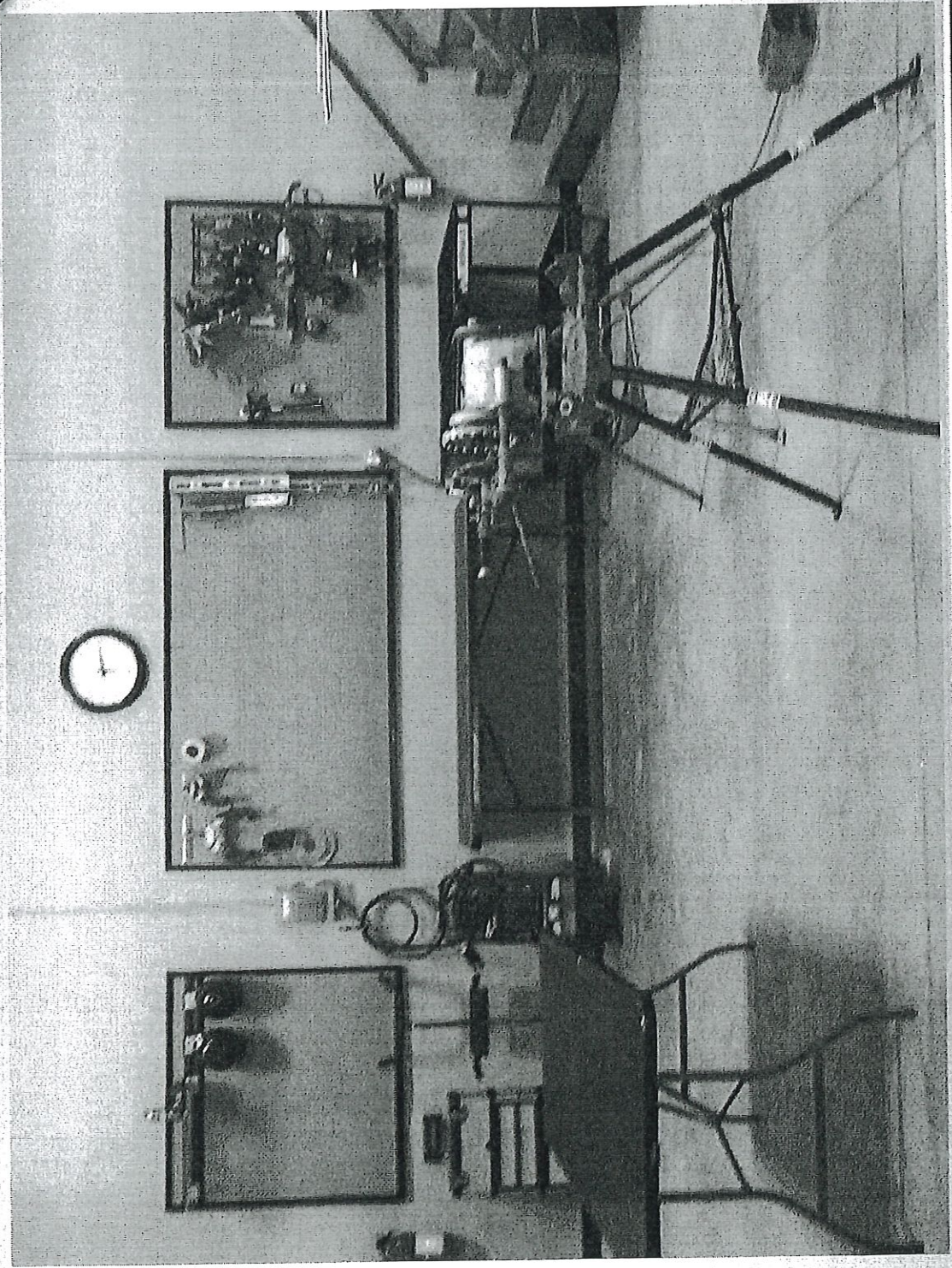
Making a World of Difference For Our Customers



P.L. FREEMAN CO.
Full Service Mechanical Contractors
Making a World of Difference For Our Customers









North End Phase 2 Project

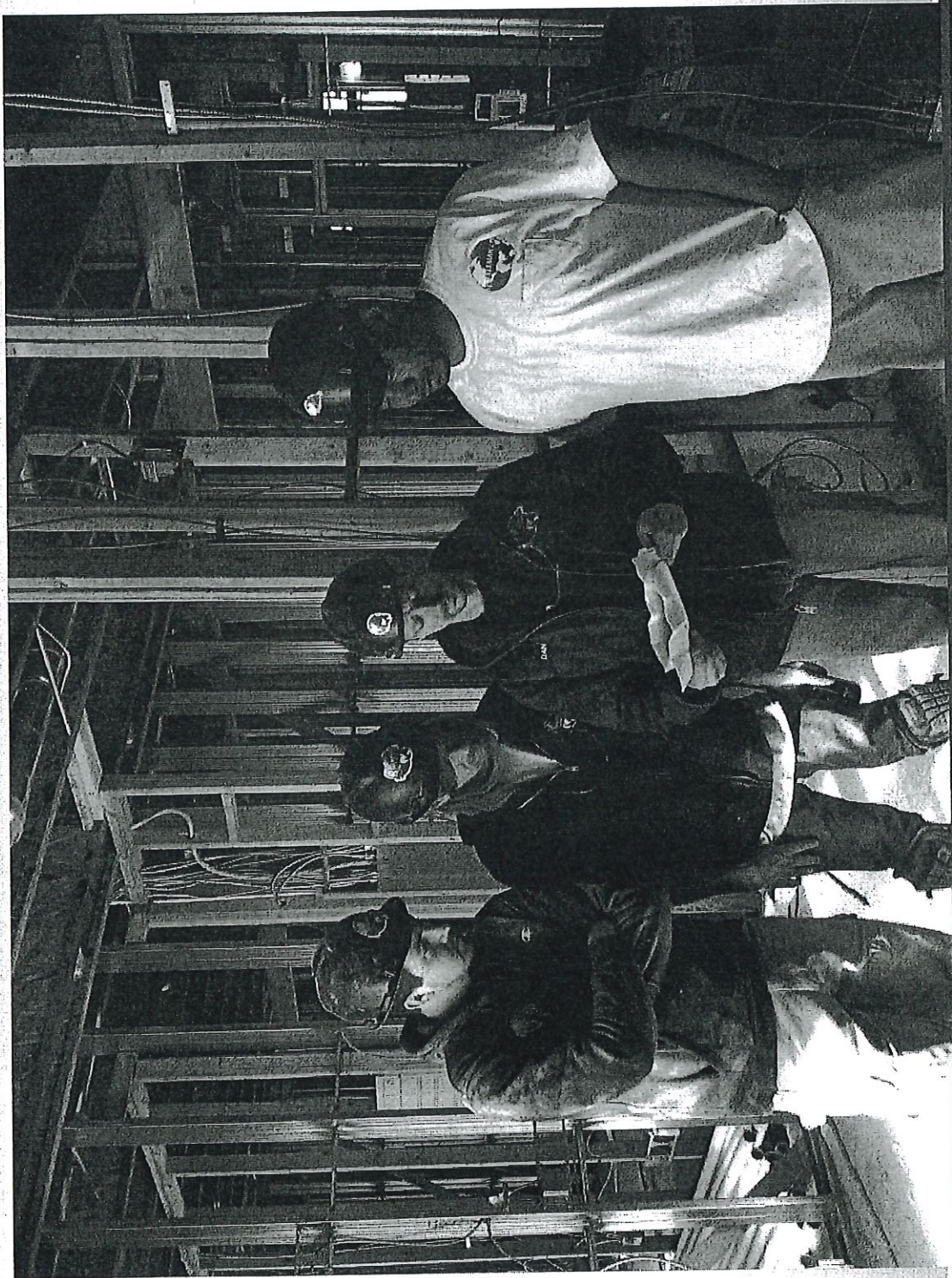
OUR ROLE

In July of 2012, the P.L. Freeman Co. was invited by the Mandel Group, Ray Hintz LLC and Quality Heating of Brookfield to participate on this high profile project. As part of a mentor-protégé agreement with the City, Mandel Group and Quality Heating of Brookfield, P.L. Freeman has increased and strengthened their business and “design-build capacity”. P.L. Freeman has been involved in every aspect of the project from the design, estimating, project management to the construction phase

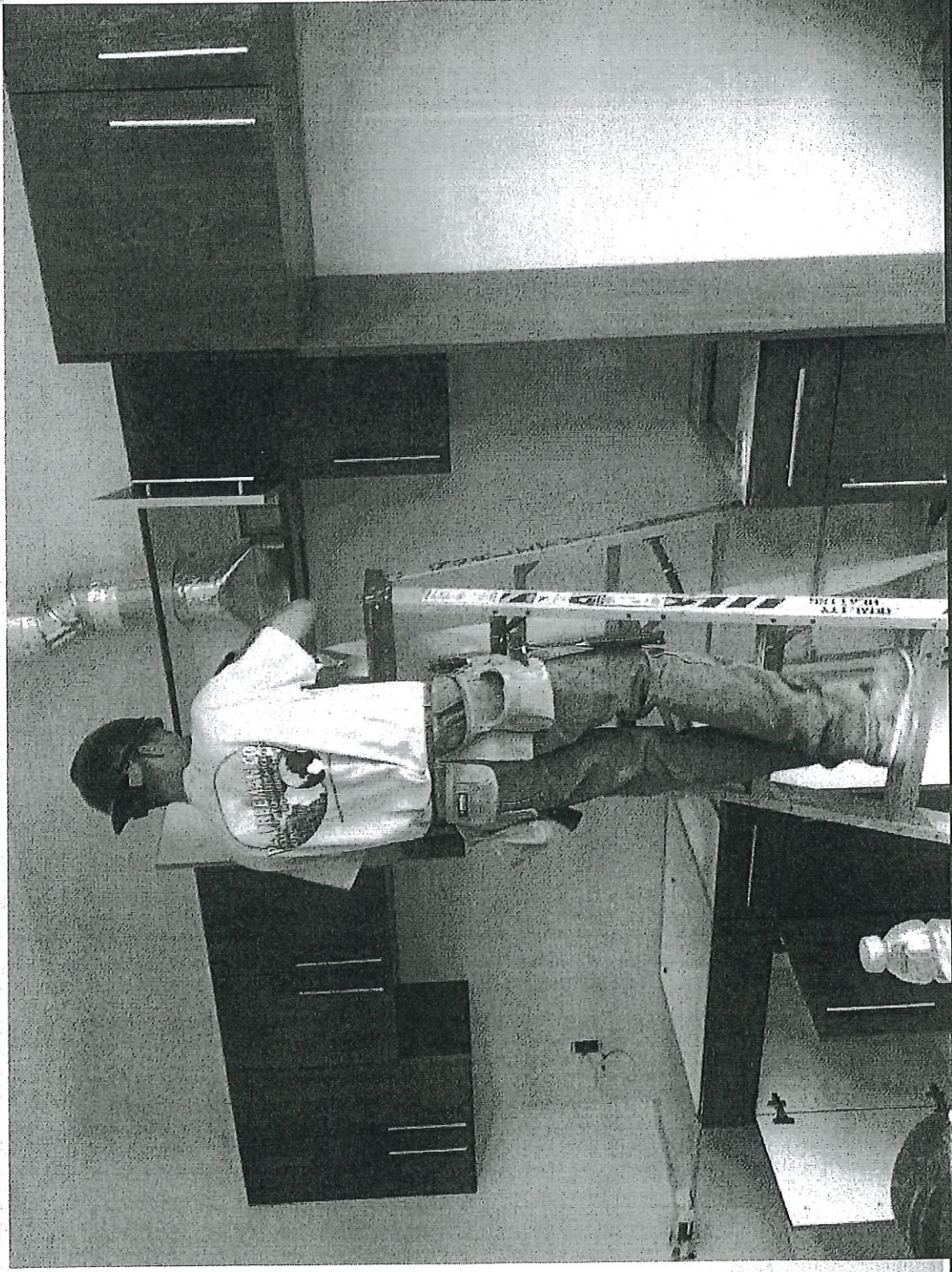
On this Project P L Freeman installed the residential furnaces, air-conditioning condensers, line-sets, sheet metal and controls. Our service team provided leak testing, evacuation, refrigerant charging and start up services. Building No. 2 consists of 55 residential units over two levels of parking. The upper level of parking contains a lobby and 3,200 square feet of retail. Building No. 3 consists of 95 residential units, the upper level of parking contains a lobby plus an additional 5 residential units, for a total unit count of 100.



North End Phase 2 Project

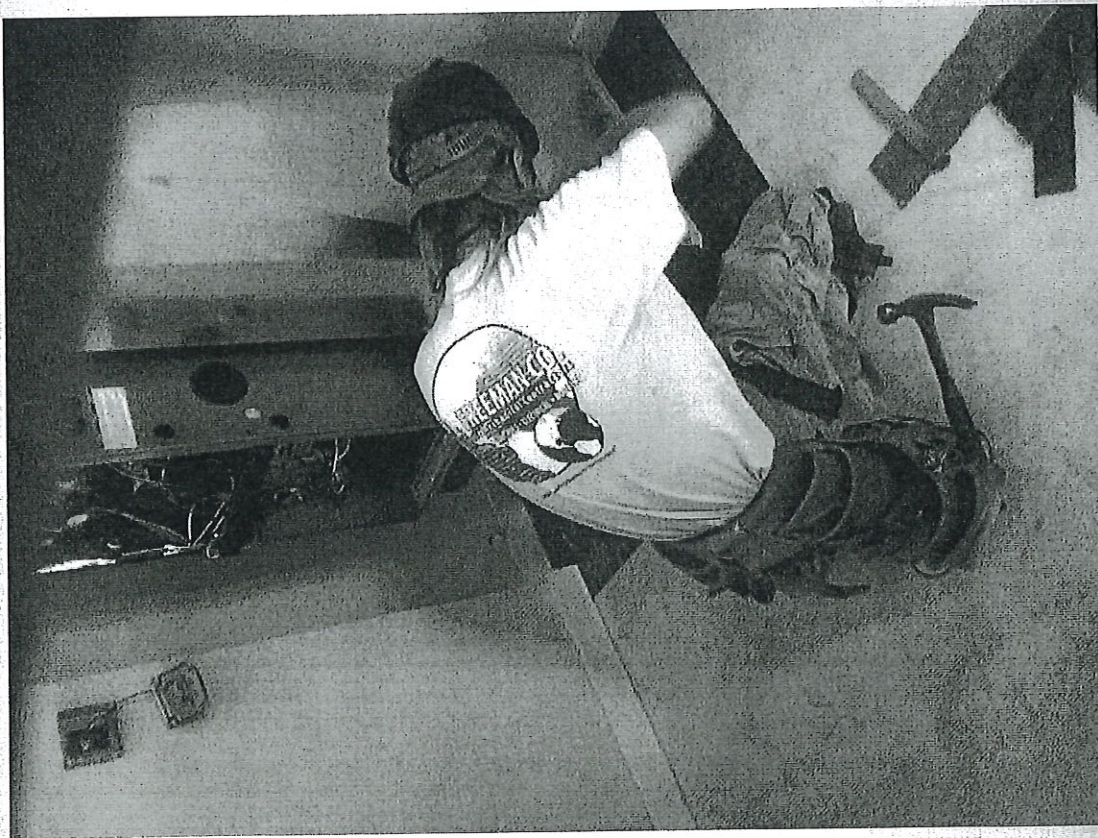


North End Phase 2 Project



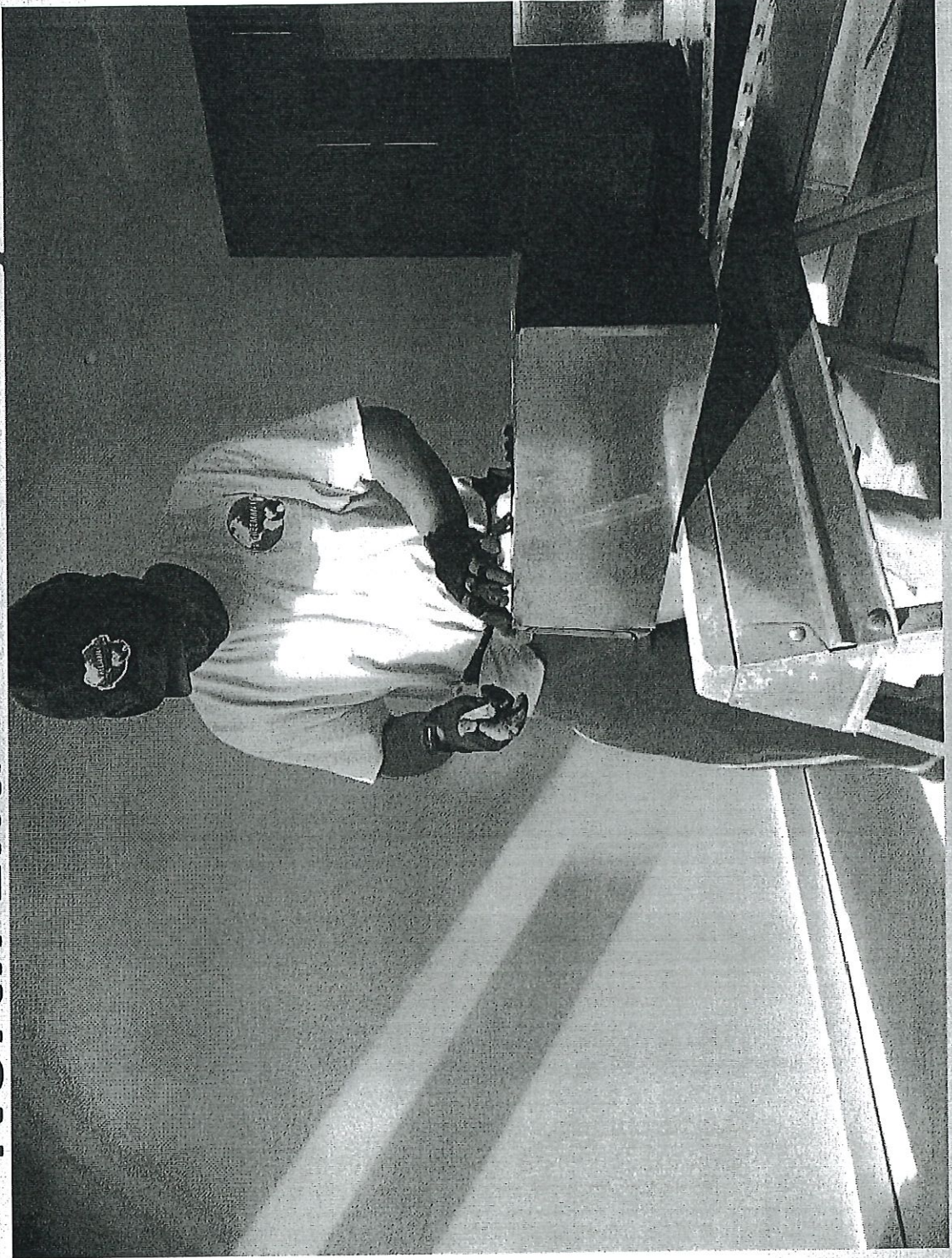


North End Phase 2 Project



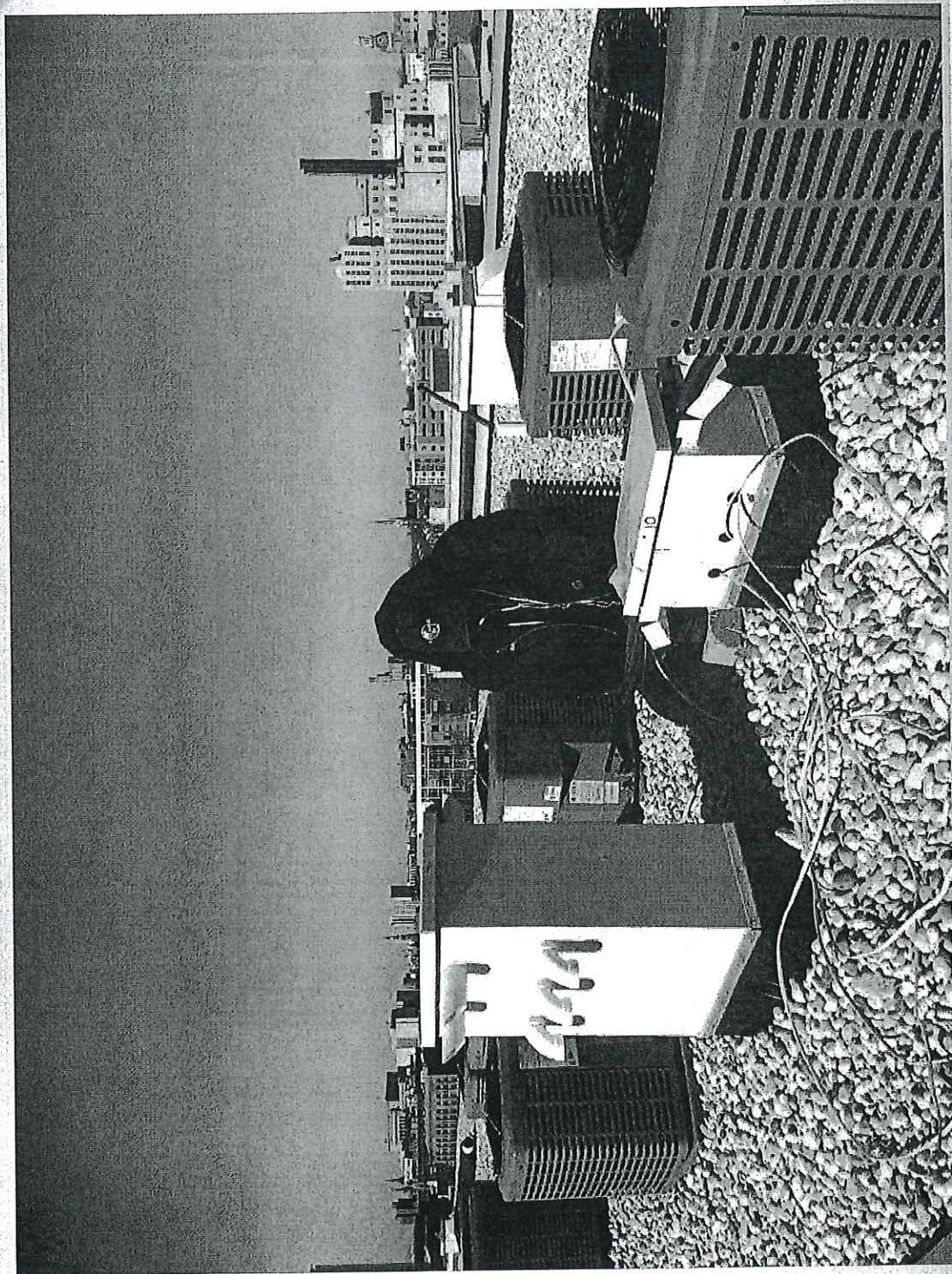


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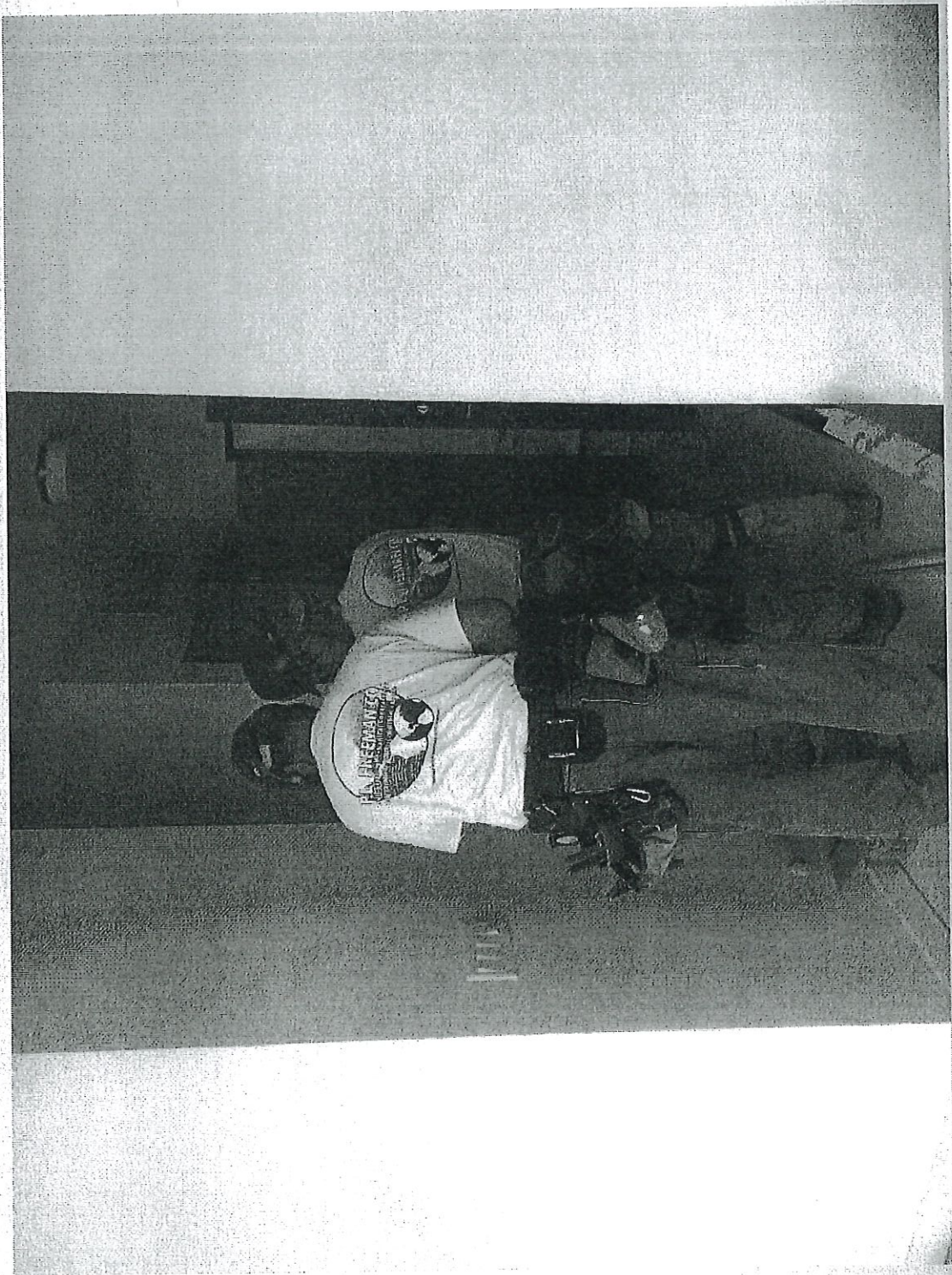


North End Phase 2 Project





North End Phase 2 Project





North End Phase 2 Project



North End Phase 2 Project

