



# STRATEGIC INSIGHT

# TRANSFORMATIVE RESULTS

## WHY NEXO GROUP?

Nexo Group provides expertise in helping our partners to define goals that their organizations want to achieve, assess the current state against those goals, and develop the required road map to achieve transformational results. We accomplish this by providing a non-traditional integration of service offerings across four knowledge areas of finance, technology, strategy, and operations. With our combined experience, value is realized from the beginning of the engagement to exceed your expectations.

- 94%** Client Retention Rate
- 28** Avg. Years of Industry Experience
- 100%** Advanced Degrees & Certifications

## KEY DIFFERENTIATORS

Our primary key market differentiator is that we are consultants focused on operationalizable solutions, but there are many characteristics that other firms don't measure up to:

- ▶ Client-Centric Methodology
- ▶ Cross-Functional Collaboration
- ▶ Hands-on-Experience
- ▶ Multi-Industry Experience
- ▶ Strong Partner Integration
- ▶ Strategic Thought Leadership

## PROFESSIONAL SERVICES



### Business Risk & Assessment

Goal definition, gap identification and remediation planning.



### System Evaluation & Integration

Current/desired state definition, requirements development, and deploy.



### Strategic Data Planning

Information needs assessment, systems analysis, consolidation and integration.



### Data Analytics and Reporting

Aggregation, normalization, mapping, & visualization of data for decision Making.



### Policy & Procedure Development

Documentation of business processes and standard operating procedures.



### Business Continuity & Recovery

Plan to address business interruption and resilience.



### Merger and Acquisition Support

Systems & cybersecurity planning related to changes due to M&A.

## SERVED INDUSTRIES

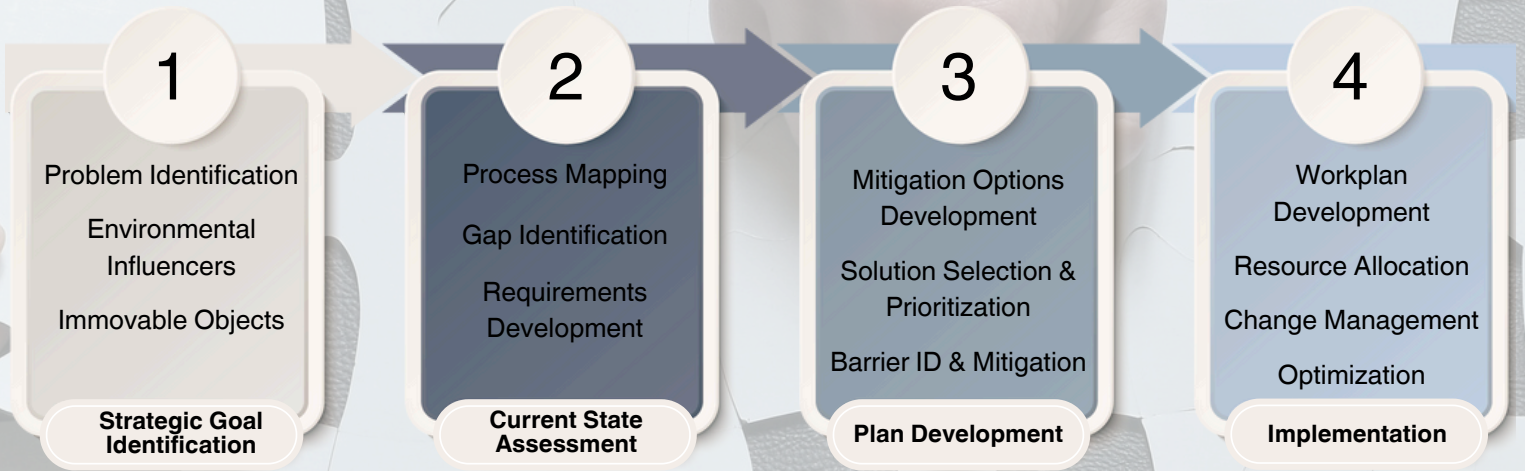
- ✔ Communications
- ✔ Engineering
- ✔ Healthcare
- ✔ Non-profit
- ✔ Defense
- ✔ Finance
- ✔ Manufacturing
- ✔ Venture Capital





## OUR APPROACH

Whether for a targeted area or a multi-year organizational strategy, Nexo Group uses a 4-step strategic approach to help organizations focus on their core objectives through active facilitation.



## OUR PEOPLE ARE OUR STRENGTH

Nexo Principals and our team of consultants leverage a combined experience of over 125 years in a broad range of business, technology, and financial processes and organizational leadership across a broad spectrum of industries and vertical markets. They bring that vast and diverse experience to help organizations demonstrate value to the individuals they serve and the funders and clients who pay for those services. Specific areas of expertise include data security, policy and process documentation, data modeling and analysis (financial and healthcare), organizational strategy, value proposition exploration and documentation, system selection, design, implementation & integration and strategic finance support.



**José A. Rosario III, MBA**

*Principal / Owner*

Throughout his career spanning more than 25 years, Mr. Rosario has provided technical and leadership expertise in the assessment, development, implementation, and management of technology solutions. These efforts have generated demonstrated value for organizations of all sizes and business sectors

including enterprise, manufacturing, small business, not-for-profit, and healthcare. Over the last decade, he has served as a primary strategist for his clients in the optimization of business processes, cybersecurity hardening, and organizational efficiency. His core competencies include business analysis and assessment, strategic information planning, data management, risk mitigation solution strategy, business case development, project valuation, and project management.



**John M. Pennell, MS**

*Principal / Owner*



Mr. Pennell is a dynamic leader and business strategist with demonstrated success in all aspects of executive leadership, operations and finance evidenced by a successful career that spans more than three decades. During the last 30 years, he has served as a member of multiple C-Suite Teams providing primary leadership in all aspects of organization operation and finance with demonstrated success. In addition to his leadership expertise, he has also significant experience as an educator teaching financial analytics and managerial accounting at the graduate level. His core competencies include streamlining technical, financial, and operation processes through the effective use of analysis, process improvement, and project management tools.

