BBALLEN CONSULTING GROUP, LLC

SINCE 2003

Purposefully evolving individuals, organizations, and communities for the better good

bbAllen Consulting Group, LLC

Business Plan

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Executive Summary

Business Background:

bbAllen Enterprise, LLC, established in October 2003, two African-American sisters, Denise M. Johnson and Cindy Lewis (Walker), ventured out independently to develop their business, incorporating their professional strengths. Denise, an experienced IT Project Manager, and Cindy, a Marketing executive, decided to team up and establish a company that could combine their strengths, skills, and talents.

The business name is a tribute to the sisters' brother, Allen, who had passed away years prior as an infant. Allen was Denise's baby brother and Cindy's big brother, so the significance of the b. b. stands for baby and big brother, hence bbAllen.

The initial vision for bbAllen Enterprise, LLC was to establish multiple entities under bbAllen Enterprise, LLC, to utilize their skills and assist others in reaching their God-given talents. The initial entities formed to conduct business were bbAllen Consulting Group, LLC and Allen's Inspiration, LLC. bbAllen Consulting Group, LLC was established as a vessel to provide services to clients to assist organization mitigation and manage change due to IT and Marketing initiatives with innovative solutions. Over the years, Denise has expanded her experiences and list of clients as an independent consultant providing IT Project Manager Consultant services. Eventually, the partnership transitioned into two separate entities, the Marketing component transitioned into an individual business, and the partnership dissolved.

Over the years bbAllen Enterprise, LLC has evolved; Allen's Inspiration, LLC dissolved, and Cindy left the partnership to establish a separate Public Relations business and Marketing organization. At the end of December 2016, Denise welcomed a new partner, Carl Johnson, to bbAllen Enterprise, LLC, with a vision to expand the business to incorporate a separate component to provide construction services. The construction component was discontinued in January 2023 and re-established as a separate entity effective January 2023.

Business Highlights:

A Minnesota-established business in 2003, bbAllen Consulting Group is an African-American, woman-owned business. The primary goal is to maximize our client's effectiveness and efficiency through specialized consulting services. bbAllen will provide integrated services based on the principles and best practices based on Program Management (PM), Organization Transformation (OT), Organization Leadership, and Organization Development and Change (OD&C).

bbAllen Consulting Group, LLC has engaged in a wide range of industries involving PM and OD&C; Healthcare, Government (State and County Agencies), Non-Profit, Education, Financial, Insurance, Electronic Publishing, Software/Hardware Development and Retail, Application Development, Infrastructure/Data Center, Facilities, and Video Conferencing Room Construction.

Dr. Denise M. Johnson, the owner and Principal Consultant, has aligned her credentials, skills, knowledge base, and tool kit with the competing market to ensure sustainability. As she combines the PM best practice and OD&C practice, our specialized services assist clients in achieving their full potential based on the philosophy of applying the discipline of OD&C to foster positive relationships with individuals, teams, clients, communities, and the world. Therefore, it is imperative to utilize appropriate leadership skills to orchestrate strategic and cultural shifts successfully. The ideal approach brings together key decision-makers and stakeholders to identify the source of issues or changes early in the process, provide strategic direction, leadership, governance, and framework, and develop critical technical, business, and humanistic resolutions essential to implement for the organization strategically.

Objectives:

The objective of bbAllen Consulting Group, LLC, is to expand the ability of the company to provide services to private, public, and non-profit organizations and communities. bbAllen Consulting Group, LLC services will align with Project Management (PM) and Organization Development and Change (OD), Leadership Development, Organization Transformation, and a combination of the fields. To list of services will include, but not be limited to, the following:

- Organization Development and Change: Strategic Planning, Organization Design, Leadership, Group Dynamics and Team Effectiveness, Cultural Awareness and Change, Transformational Change, Diversity Equity Inclusion (DEI), Transformational Learning, Leadership and team coaching and mentoring, stakeholder assessment, Operational Readiness, and Use of Self.
- Organization Leadership; Leadership coaching and mentoring, leadership development, and leadership secession planning
- Organizational Transformation: Leading a People-Centered Transformation, Leading cultural change, selecting leadership, define the future state of the organization, develop a roadmap for execution, Achieving Transformation Outcomes, Market Awareness, and Strategic Response, Assessing Transformation Capabilities,
- Project Management Services: Project Management best practices, Project Charter Creation. Defining Scope, Project Management Plans, Stakeholder Management, Communication, Project Budget Management, Status Reporting, Procurement Management, Risk and Issue Management, Resource Planning, PMI/PMBOK, Agile/Scrum, Waterfall, Iterative, Software Development Life Cycle (SDLC), and RACI

Vision:

To preserve the legacy of the brother's name, Allen, by continuously evolving the organization to align, change, and grow to meet the needs of the global market and clients.

To continuously evolve the organization to empower women and minorities to embrace their skills and abilities and excel in meeting their God-given potential. To lead by example, the values required to advance the common good throughout the world.

Mission Statement:

The mission is to evolve the business to be a source of empowerment for women and minorities to reach their God-given potential. The organization's goal is to professionally display the organization's values with each engagement, be a morally responsible and respectable leader, critical thing, thought leader, and change agent, and work to advance the common good.

Company Values:

- Collaboration
- Integrity
- Honesty
- Transparency

Keys to Success:

bbAllen provides clients with consistent Professional Management and IT Project Management Consulting services based on the knowledge of various PM, OT, and OD&G best practices, principles, and toolkits and leveraged diverse industry knowledge. As the Owner, CEO, and Principal Consultant, Dr. Denise M. Johnson has aligned her

credentials, skills, and knowledge base with the competing market to ensure sustainability for herself, bbAllen, and potential partnership.

bbAllen Consulting Group, LLC's Credentials:

CERT Re-certified - 2022
CERT Certified – 2017
Secured Master Contract with SITE Program – July 10, 2017
Secured Master Contract with Hennepin County – January 1, 2018
Secured Master Contract with MNSITE Program – June 18, 2018

Denise's Credentials:

Sr. Project/Program Manager since 1994
Project Management Institute (PMI), November 2003 - Present
Project Management Institute-MN Chapter (PMI-MN), November 2003 - Present
Project Management Professional (PMP) Certification, July 2005
Established bbAllen Consulting Group, LLC in October 2003
Project/Program Management Consulting since February 2004

University of St. Thomas – Organization Development and Change Ed.D Doctoral program November 2022
Walden University – Organizational Leadership and Change Ph.D Doctoral program (some coursework completed) - 2013
University of St. Thomas – Master of Software Systems (MSS), December 2002
University of St. Thomas – Bachelor of Arts – Quantitative Methods and Computer Science, May 1999

Description of Business

Company Ownership/Legal Entity:

bbAllen Enterprise, LLC

- Originally established as a partnership between Denise M. Johnson and Cindy Lewis (Walker)
- Currently established as a partnership between Denise M. Johnson and Carl Johnson

bbAllen Consulting Group, LLC

- Established initially as an alias entity, Doing Business As (DBA) for bbAllen Enterprise, LLC
- Currently established as a separate entity under bbAllen Enterprise, LLC

Location:

bbAllen Enterprise, LLC and bbAllen Consulting Group, LLC are considered home-based businesses, with the legal address being: 4463 Ashton Curve, Woodbury, MN 55129.

A separate mailing business address for secured mail: 2515 White Bear Avenue, #271, Maplewood, MN 55109 for both bbAllen Enterprise, LLC and bbAllen Consulting Group, LLC

Services:

bbAllen provides clients with consistent Professional Management and IT Project Management Consulting services based on the knowledge of various PM, OT, and OD&G best practices, principles, and toolkits and leveraged diverse industry knowledge. As the Owner, CEO, and Principal Consultant, Dr. Denise M. Johnson has aligned her

credentials, skills, and knowledge base with the competing market to ensure sustainability for herself, bbAllen, and potential partnership. Currently bbAllen Consulting Group, LLC provides the following services.

- Program/Project Management consulting services
- Professional Management consulting services
- Project Coordinator consulting services

Future planned services for new entity:

Expand the Professional Management consulting services to include the following:

- Organization Development and Change consulting services
- Executive coaching services
- Organization Transformation consulting services
- Consulting Services
    - Create a pool of consultants to expand the services currently provided
    - Provide consulting services to transitioning workers from employment to consulting
    - Create a manual to assist individuals with identifying their career path, objectives, and goals

Management:

bbAllen Consulting Group, LLC currently does not have any active employees. Dr. Denise M. Johnson is the company's CEO, President, and Principal Consultant, who manages the business.

Define the goals and direction of the organization

- Manage the marketing and search of potential clients and consultants
- Manage all business operations and financials

HR Management

- Process in securing new contract assignments,
    - Centralize the point of contact to receive and follow up on postings of open opportunities
    - Identify potential candidates to fill the opportunity
    - Align qualifications and requirements with the potential candidate's experience and qualification
    - Confirm interest, availability, and rate requirements are acceptable to the potential candidate
    - Submit candidate for the position
    - If a candidate is considered, work with the client to follow through with the next steps to potentially secure an assignment
    - If approved, finalize a contract with both the client and the candidate
    - Approve contract
- Subcontractor Management
    - Subcontractors are not employees of the prime contractor and will not be responsible for training, personnel support, or development
    - The subcontractor organization will have a single point of contact with the prime contractor for contractual matters. The subcontractors are expected to identify their single point of contact for contractual concerns. On a day-to-day basis, all subcontractor personnel will be free to interact with any prime contractor personnel as needed to fulfill the subcontract.
    - The prime contractor must be kept aware of the project's overall progress, including each subcontractor's progress. The subcontractors will report progress along with the client timesheet weekly. Based on the information in the weekly Timesheet and Progress Reports, the prime contractor will compare to the monthly subcontractor invoice. The prime contractor will review the invoice for payment

    - The subcontractor organization will prepare and deliver the monthly progress report each month. The report will be provided by the end of the last day of the month. The report will identify:
        - Authorized work that was scheduled to be performed during the month
        - Requested planned time off for approval
        - Work accomplished
        - Work that is scheduled to be performed during the next month, including any internal milestones expected to be reached
        - A brief description of any problems encountered in performing the activities of the or warnings of schedule slippage.
    - Review request for time off and sick time based on approval of the client
    - Prime contractor will discussed issues raised and tracked resolution
    - Prime Contractor will encourage open two-way communication with subcontractors as well as client
    - Prime Contractor will report to client, on a regular basis, any acknowledgements and concerns reported by subcontractor
- Process regarding dispute resolution process
    - In the event of a disagreement with the client related to work performance
        - Confirm client's expectations of the assignment and required performance
        - Confirm placement's expectation of the assignment and performance
        - Discuss any discrepancies with the placement and determine next steps
        - Any dispute arising out of the contract, which can not be amicably resolved between parties, shall be referred to arbitration in accordance with the laws of the State of MN
- Process for criminal background check
    - As sole Consultant for the company Denise has had no issue with completed and passing both criminal and drug testing for clients
    - There are no issues with conducting criminal and drug testing for existing consultants or any future consultants
    - bbAllen is willing to implement criminal background checks if awarded a contract
- Breakdown and distribution of hourly rate charged to a client
    - Distribution to placement – 90% of rate charged to client
    - Distribution for overhead – 5% of rate charged to client
    - Distribution for profit – 5% of rate charged to client
    - Example:
        - Rate charged to client - $150/hr
        - Distribution to placement – $135/hr
        - Distribution for overheard – $ 7.50/hr
        - Distribution for profit - $7.50/hr

Business and worker's compensation insurance secured for the organization to work with clients.

Insurance Policies:

- General Liability Insurance
- Worker's Compensation
- Professional Liability Insurance (acquired when required)

Dr. Denise has acquired an Insurance Agent to assist with managing required business insurance and worker compensation.

Insurance Agent:

Terrence R. Sweeney
Richfield State Insurance

PH) 612-861-8301
F) 612-861-8302

Financial Management:

To assist with the management of the financial aspect of the organization, Dr. Denise has acquired both an Accountant and Financial Planner

Accountant:

Carrol J. Gatlin, CPA/ABV, MST, CMA, CVA, CGMA
Gatlin & Co.
4501 Minnetonka Blvd. #304
Minneapolis, MN 55416
(o)612.875.8481 (f)612.545.1058

Financial Planner:

Sue Ellen Nauss, CRPC®| Financial Advisor
Ameriprise Financial Services, Inc.
7101 York Ave S, STE 320 | Edina MN 55435
Office: 952.921.3257 | Fax: 952.921.3258 | Mobile: 612.325.6590 | sue.e.nauss@ampf.com

References

1. Mohamed Idris, Ed. D
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2. Marcella de la Torre, Ed.D.
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   c 1 (612) 961-6375

3. Ilena Lonetti, Ed.D.
   Modis Sr Project Manager
   651-356-4890
   lonettii@gmail.com

Rate Structure

Role Description	Minimum rate per hour
• Principal Consultant	$200

• Professional Management consulting services	$200
• Program/Project Management consulting services	$150
• Project Management consulting services	$100
• Project Coordinator consulting services	$50

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    - Distribution for profit – 5% of rate charged to client
    - Example:
        - Rate charged to client - $150/hr
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