

# The Company of Holistic Returns

...where Returns are measured in more ways than money!



*Together for change*



# Background

## Who we are:

**Myles Dean** - Transformation Leader & Expert ~ Business Strategy & Operational Transformations

**Malin Åhman** - Transformation Partner & Expert ~ Business Transformations & Self-awareness

**Micheal Billow** – Transformation Partner & Expert ~ Business Exits & Self-awareness

Our other colleagues (when needed)

**Claudia Häggström** ~ CPA and Financial Transformation Leader

**Bobby Arash** ~ Business Law and Compliance

\* Over 40 Transformation projects since 2008

\* ISO-Certified 2010

\* Expansion to USA, 2018

# Our Philosophy



So what is ” *The Company of Holistic Returns*” all about?

- We are a **Unifying Network** of individuals whose primary purpose is the development of SME’s and their owners, from a **Holistic-Strategic** perspective
- We focus on the **Whole**, where **Vision, Motivation & Positive Change** for the company owner(s) as well as the company and its employees, are the primary focus
- We use a standardized platform to help company owners and their companies develop towards **Individual & Collective Value** while quickly improving economic conditions for the company
- We are a network of business owners and experts who share common, fundamental **Personal Business Values** and are genuinely interested in helping other company owners along their life’s **Journey**. Whether it be for the many years ahead, or for the up and coming exit.

# Our Philosophy



## Our definition of "Holistic Returns" ...

### The investor's definition:

- A monetary investment that benefits more than just the investor himself. For example, investing in "environmentally conscientious" or "sustainable" business ventures.<sup>1</sup>

### Our definition:

- A measurable result of a **Holistic Activity** by the Company Owner(s), where the **Return** is measured in terms of financial, social and personal benefits.

**Note:** The **Holistic Activity** (= Change process) must be taken and implemented as a whole, and the **Return** must be measurable to the benefit of the Company's Owner(s) as well as the rest of the company.

*Otherwise, it's not a Holistic Activity nor a Holistic Return!*

# Conditions for Success



## Creating the conditions for Success...

...Are just as important as creating the **Goals**.

- Transforming the company from a **Holistic-Strategic** perspective allows the business (and those within it) a quicker path to a more **Balanced** and less stressful workplace and...
- Preparing for, and managing your exit, does not have to be the end of your world.

These life (and business) events are Very Real and Very Demanding. You don't have to be alone! We are not consultants! We are your colleagues that are here to help you, every step of the way!

Our philosophy sets us **world's apart** from the consulting world, where we say:

*“Life’s Journey should be your focus, and your “Business” should be a tool to help you get there, not something that’s stopping you from getting where you need to be.”<sup>2</sup>*



# The QUESTION

*“It’s the question that drives us. It’s the question that brought you here.  
You know the question, just as I did.”<sup>3</sup>*

“How do I transform **Chaos** to **Holistic Balance**?”

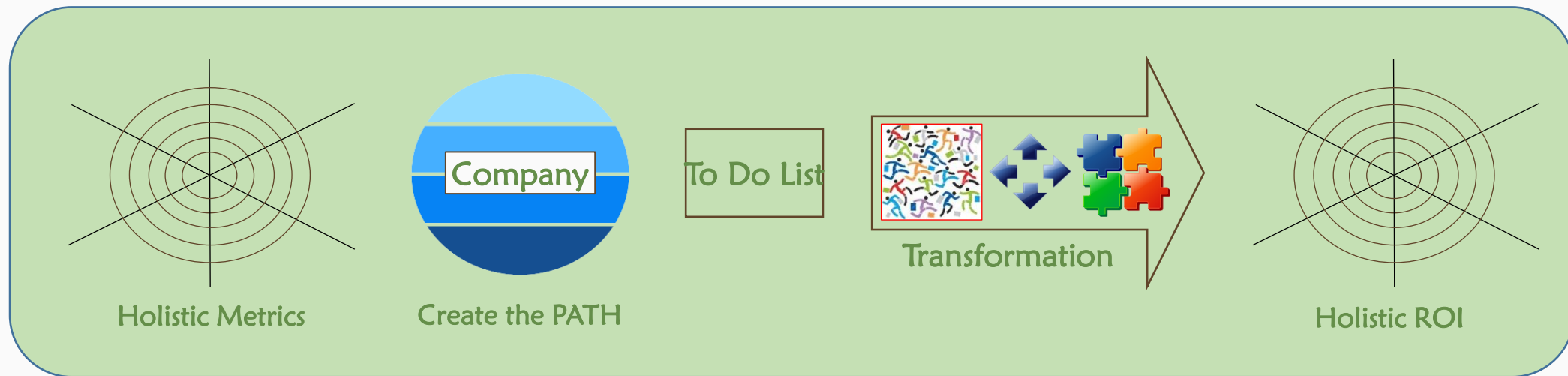




# Answer...

Follow the Transformation Pathway!

Where we create the **PATH** together...



...and then we implement it together.



# Self Reflection = The 1st step out from Chaos

The 1st step on getting your business on the right track, is to decide what the Right Track is for You.

- Where do I want to be next year?
  - Why do I want to get there?
  - What do I want to feel next year?
- What do I want to keep, what can I leave behind?



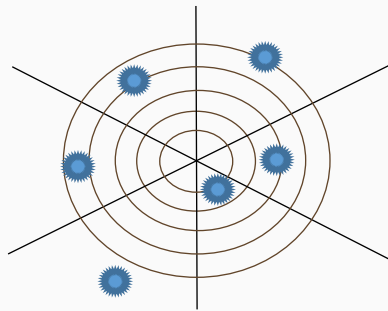
These are the questions that set the **Foundation** for yourself and your company's **future**.



# Holistic Goals = 2nd step out from Chaos



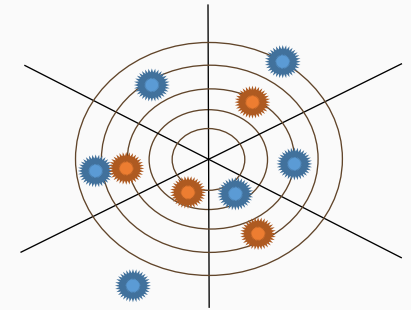
We'll need to set **Holistic Goals** so that you **KNOW** and **FEEL** that you have succeeded when you're done:



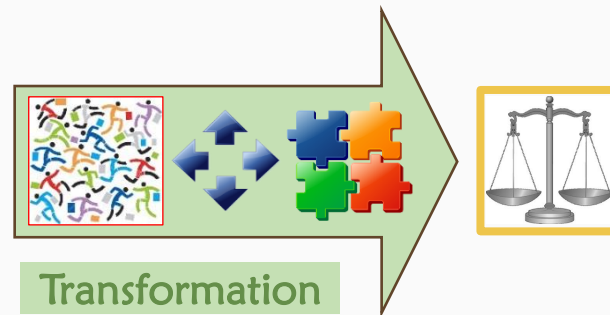
Where I am today

You set the Holistic Metrics that you want to use, not us!

- **Emotional** goals – *“I need more time with my family, etc.”*
- **Physical** goals – *“I need to slow down, I have sleeping issues, etc.”*
- **Financial** goals – *“We need to increase margins, profit by XX%”*



Where I want to be

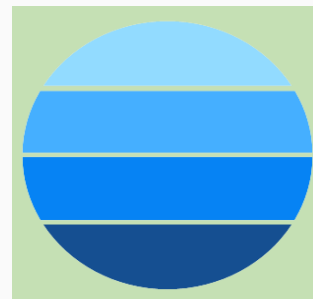
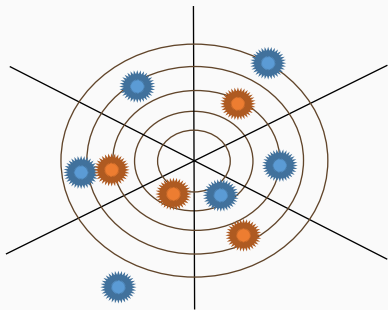


Setting **Holistic Goals** will ensure that the Transformation Project is **aligned** to your **personal needs**.

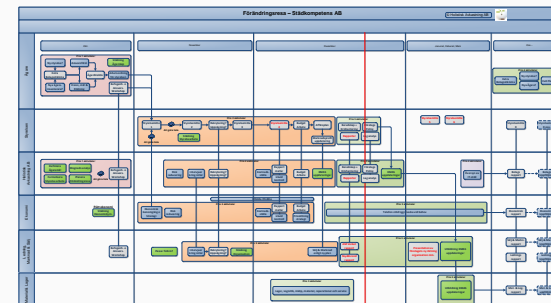
# Transformation Path = 3rd step out from Chaos



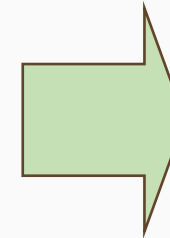
Together with Holistic Return experts, we define the **Transformation** building blocks, tollgates and milestones.



Company



Transformation

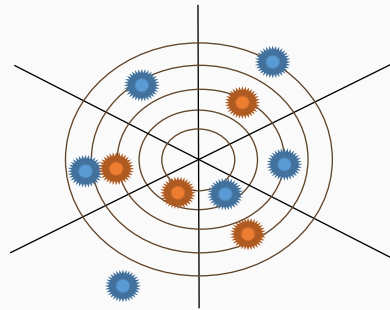


We do NOT set Due Dates!! This is NOT a race! We set a **Pathway** and then follow it.

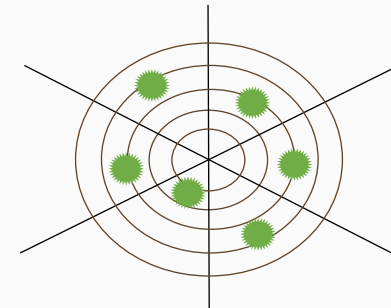
# Reflection = Last step out from Chaos!



After the Transformation is complete, we review our **Journey** and **reflect** on what we've accomplished together.



Where I wanted to be



Holistic ROI

Where I am!

The only hinder on meeting all of the **Holistic Goals** that you set up for your life, is yourself.

# Practical results in terms of \$



Here's how previous Owner-led companies succeeded financially...<sup>4</sup>

## Services Company 1

Turnover 1,5 M\$, -57 T\$ result, with a net margin -4.7% (before)

Turnover 1.4 Msek, +34 T\$ result, with a net margin +5,7% (after)

## Services Company 2

Turnover 2.1 M\$, -37 T\$ result, with a net margin -1,8%

Turnover 2.5 M\$, +68 T\$ result, with a net margin +3,3%

## Service Company 3

Turnover 451 T\$, -69 T\$ result, with a net margin -13,1%

Turnover 576 T\$, +37 T\$ result, with a net margin +7,7%

## Construction Company 1

Turnover 5 M\$, -61 T\$ result, with a net margin -12,1%

Turnover 4.8 M\$, +30 T\$ result, with a net margin +6,2%

## Construction Company 2

Turnover 2.9 M\$, -0 \$ result, with a net margin -5,5%

Turnover 2.7 M\$, +115 T\$ result, with a net margin +8,7%

4. From one fiscal year to the next

# The Company of Holistic Returns

Thank you for your interest in **The Company of Holistic Returns**.

We hope that you've now gained new insight into the deeper meaning of the words:

**Holistic Returns**

...and see the advantages and benefits of restarting your life's journey.

Myles Dean - Founder, Transformation Leader  
Malin Åhman - Transformation Partner  
Michael Billow - Transformation Partner



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