Custom Management Reporting

Knowledge Integration/Warrooms

Implementation Support Resources

Lean/Continuous Improvement

Customized Onsite Training/Seminars

Product/Service Documentation

Performance Analysis & Measurement

Technical & Operations Documentation

Corporate Training Institute, LLC • Corporate Knowledge, Inc.

We have been providing business consultancy services for over 25 years. Our many engagements are detailed in this resume, which includes descriptions of services delivered to our clients and the business areas in which we have significantly improved performance. We did business as Corporate Knowledge, Inc. until 2012, and now operate under the name Corporate Training Institute, LLC.

An outstanding organization is one that consistently delivers high value to its valued customers while attending to its employee satisfaction and growth. Achieving these goals requires a focus on the organizational capabilities to create consistent value.

All outstanding companies share four characteristics:
- Excellent problem solving
- Continuously-improved operations
- Resilient and sustainable operations
- Fundamentals mastered, resulting in simplified/streamlined operations and processes wherever possible

A common thread amongst our clients is that most had been unable to reach their desired state of growth and success due to self-inflicted disorder and confusion. Work forces had accepted and developed skill sets based on coping, with the oft-repeated refrain, "We do nothing but put out fires."

Specifically, many companies, particularly manufacturers, lack a clear supply chain methodology, their staff is not trained and management may not understand the benefit of having a well-oiled supply chain system.

Our emphasis is to improve an organization's clarity and performance, lacking which it often suffer from:
- Resources misdirected from productive use
- Employees feeling they are wasting time and who are unable to get to their "real work"
- Poor decisions and results that cost money and time
- Repeated missed deadlines or deliveries
- Inventory problems and inaccurate forecasting

CTI achieves this by utilizing both its consultancy expertise (identifying the organization's actual, rather than perceived, problems), improving reporting, streamlining processes and providing training services (instilling the key knowledge to create and maintain an improved scene). By putting into place fundamental management concepts, the organizational leadership is able to sleep at night, your work force is energized at the end of the day with an increased respect for itself as a team and your customers are happy.

Benefits of Working with CTI
- We have over two decades of experience
- We utilize time-tested workable technologies and methodologies
- We work toward lean and sustainable solutions, resulting in value-added for your customers and for your organization
- Our efficiencies allow us to operate at a competitive price point

We work out a complete strategy that is compatible across the organization, that reduces waste and is designed with sustainability in mind. Unlike other consulting companies, our management is not at arm's

length from your project; we are right there, in the trenches, making sure that the overall product is achieved.

CKI actually performs the work: We do not hand off to-do lists to your already over-leveraged staff, or expect you to supervise and coordinate the project – that's our job. Our cross-trained team does the work to get you a completed solution, whether that is an implementation, content management, a shared service center, business process management, financial restructuring, transaction cost reduction, IT documentation or training. We deliver documentation, software, your trained staff, the cultural change necessary for your organization to embrace the new system, ongoing support, reporting and metrics - all of it.

Our team becomes a valuable stable point for your executives and staff. In fact, members of our team have continued to be resources to our clients long after the projects are completed, resulting in long-term continuous improvement relationships.

Corporate Training Institute, LLC, welcomes the opportunity to assist you in making your organization outstanding.

Contents

Section 1. Business Process Optimization (Coordination / Planning / Implementation)

Aerospace Industry

Allfast Fasteners

Reviewed existing manual planning process and migrated it to standard planning practices.

Key middle management received complete training the current MRP system. Use of system was pivotal to overall performance improvement in Sales/Ops, Planning, Inventory, and corporate audit.

Established needed Safety Stock standards for all currently-produced products.

Established Best Practices relative to Open Order processing.

Improved Shop Floor Production Control process.

Identified and began reduction of over 14% of raw inventory; valued in excess of $1.5 million.

Trained staff on APICS BSCM and MPR training modules.

Contel Federal Systems

Procedures and Work Instructions:

- Developed a new Operations Forms Manual for servicing clients in both foreign and domestic bases for the U.S. Government.
- Attended design meetings and conducted user interviews in compiling this documentation.

ITT Cannon USA

MRP II Policies, Procedures and Work Instructions for AS/400 Platform:

- Assisted with the implementation activities of MRP II/AS/400 Computer System.
- Attended design meetings and conducted user interviews to assist in gathering requirements for developing the policies, procedures and work instructions for MRP II.
- Documented Contract Engineering, Material Control, Bill of Materials, Inventory Control, Production Control, Procurement, Accounts Payable and Dock-to-Stock Systems.
- Developed supporting user documentation for all departments using the MRP II Systems.
- Prepared numerous work instruction manuals.

ITT Gilfillan

MRP II Policies, Procedures and Work Instructions:

- Assisted with the implementation activities of MRP II Computer System.
- Attended design meetings and conducted user interviews to assist in gathering requirements for developing the policies, procedures and work instructions for MRP II.
- Documented Contract Engineering, Material Control, Bill of Materials, Inventory Control, Production Control, Procurement, Accounts Payable and Dock-to-Stock Systems.
- Developed supporting user documentation for all departments using the MRP II Systems.
- Prepared numerous work instruction manuals.

Perkin Elmer, Inc.

- Assisted with the user analysis, design, development and production of documentation standards for a new, cutting edge technology and tool for the oil refinery industry.
- Full design and development of detailed product documentation for testing, calibration, installation and maintenance of tool and related computer systems. This included guidelines, quick reference, and work instructions as well as policies and procedures.
- Design, development and documentation of all computer technical hardware and software, including the development of artificial intelligence modeling for the use of the monitoring tool.

- Design, development and documentation of management and operation of the monitoring tool, so that performance, accuracy and effectiveness of the tool could be measured.
- Design, development and production of training materials for corporate technical customer service employees.
- Preliminary marketing tools for pilot testing.

Teledyne Systems, Inc.

MRP II Policies, Procedures and Work Instructions:
- Assisted with the documentation of the MRP II Computer System and related policies, procedures, and work instructions.
- Documented Purchasing, Material Control, Bill of Materials, and Purchase Control Systems.

Zodiac Inflight Entertainment

APICS Training. Supplied three modules of APICS CPIM training to middle management.

Banking/Savings & Loan

Wells Fargo Bank

CKI was a member of the ALPS (Alternative Loan Payment System) team, which implemented the over-the-counter (OTC) Payment Processing Project (PPP). The project systematized the processing of OTC payments of credit cards, lines of credit, commercial, retail and mortgage loans. This embraced deployment of a paperless technology for 1.5 million OTC transactions per month in approximately 2400 branches across the banking institution, requiring extensive analysis of operations and reconciliation issues (research, resolution and balancing) with multiple separate electronic systems of record. CKI did the following:
- Conducted *Warroom*s to identify pre-implementation organizational and operational issues, systems and requirements.
- Identified job description and critical policies for establishment of the new ALPS department.
- As the system was tested and implemented, developed procedures for use of nineteen systems that provided research and verification information to ALPS staff.
- Conducted research, compiled and wrote ALPS Accounting Research and Reconciliation, Loan Account Number Search and transaction procedure manuals.
- Was a member of the System Implementation Team responsible for identifying, analyzing and resolving system, process and training issues.
- Conducted training for startup staff.
- Participated in General Ledger Accounting Reconciliation to identify system workflow and problems.
- Help Desk assistance procedures.

California Commerce Bank

CCB was maintaining over 100 policies and procedures with an MS-DOS-based word processor. The Vice President of Documentation was maintaining over 100 copies of the Operations Manual (with more than 2000 pages per manual) scattered over several Southern California and Mexico sites. He had to make changes in several policies and procedures each week just to keep up with and maintain compliance regulatory requirements.

CKI helped establish the standards, modularization, graphics and structure of the documentation when CCB decided to update to a full Windows Help system. The organization converted more than 2000 pages into one consistent, fully cross-referenced and indexed Windows Help file.

With the new system, CCB distributes its manual solely on-line; when changes are required, they are done in one location. The manual's Help file is on the bank's network server and all the bank personnel have direct access to it. CCB has eliminated:

- Thousands of dollars per year of hard-copy reproduction and distribution costs.
- Hundreds of feet of shelf space for difficult-to-use binders.
- Concern as to whether the document being referred to is the current policy.

In addition, telephone directory and communication standards are used on a daily basis. The entire enterprise uses the system. Training for new employees is enhanced by having all procedures on-line. New employees can rapidly get specific information to help them handle the functions and processes of their area.

Citicorp (TTI)

Development of End-User Documentation for Application Generation System:
- Re-wrote the end-user documentation for TTI's fourth generation language and application generator, which is used for ATM machines.
- Developed a complete library for this state-of-the-art graphics and programming tool.

Farwest Savings & Loan

Branch Operations

- Assistance in the training, testing and implementation of the fully integrated Systematics System.
- Development of training materials to train trainers, tellers, New Accounts personnel, Assistant Branch Managers, and upper management.

Developed and produced a departmental Documentation Library. Produced the following manuals:

- Policies and Procedures Manual
- Forms Manual
- Reports Manual

Tasks Manual

- Configuration Manual
- Computer Manual

Quick Reference Guide

Help Desk procedures

The project included development of support manuals of corporate standards and maintenance of the documentation system.

Transaction Services

Developed and produced a departmental Documentation Library. Produced the following manuals:
- Policies and Procedures Manual
- Forms Manual
- Task Manual

Some of the areas covered in the manuals were ATM, EFT/ACH, Inclearings, Department Auditing, G/L Reconciliation and Federal/State Regulations.

Accounting

- Developed Reports Manual and Reporting Requirements and Procedures.
- Developed manuals documenting the preparation of monthly and quarterly reports for the OTS and Department of Savings and Loan.

Major Loans

Policies and Procedures Documentation:
- Documented policies and procedures for the Major Loan area.
- Contributed to instructions for the development of a Database Manual, a Forms Manual and a Reports Manual.
- Documented procedures for reporting to Fannie Mae and other investors.

- Assisted with implementation and testing prior to the cutover to Systematics System.
- Sales & Operations tools and reports.

Documentation Department

Documentation Procedures:
- Prepared training program and materials to familiarize documentation personnel with maintaining documentation.
- Trained documentation personnel with hands-on training to assure quality and integrity of Electronic Library administration.

First Federal Bank

Converted and updated 600 pages of retail banking policy and procedure, converting it from Word Perfect to Microsoft Word with updated styles. Documentation was subject to a three-step client review process.

Designed and implemented On-Line Help system, and migrated onto it the updated policy and procedure.

Gibraltar Savings & Loan

Operations Documentation Project:
- Evaluated operations documentation, design of new models and formats for use by operations and programming staffs.
- Prepared documentation (Reconciliation, QA, Controls and Balancing Procedures) for the Installment Loan System.

California League of Savings and Loan Associations

Warroom: Analysis of development of new services and enhancement of current service-related products that this institution offers its members.

Southern California Savings & Loan

Branch Operations

Developed and produced departmental Documentation Library.

Reviewed and re-wrote the existing Policies and Procedures Manual.

Developed the following new manuals:
- Forms Manual
- Tasks Manual
- Retirement Manual
- Security Manual

Prepared supporting documentation for the documentation system maintenance.

Documentation Area

Documentation Procedures:
- Prepared training program and materials to familiarize documentation personnel with maintaining documentation.
- Trained documentation personnel with hands-on training to assure quality and integrity of Electronic Library administration.

ACquire Project:
- Analysis and development of End-User Guide:
- Developed End-User Guide for a report retrieval, search and custom output program. No previous documentation existed on this new report-generated program.
- Prepared all documentation.

Cedars Bank

Responsible for the establishment of general policies and procedures for most of the bank's operational areas. Reviewed and rewrote the existing Policies and Procedure Manuals in these areas:

Branch Operations	Internal Audit
Informational Technology	Finance and Investment
Administration	Executive
Personnel	Corporate Marketing
Employee Manual	

Developed standards for establishment and maintenance of the bank's documentation.

Established the company on-line Telephone Directory.

Fidelity Federal Bank

Performed *Warroom* Analysis on Transaction Services areas to determine which functions would need policies and procedures and work instructions when the Systematics IMPACS System was implemented.

Tasks and Procedures:
- Branch Support – Inclearing Exceptions, Transit Exceptions, Federal Adjustments.
- Electronic Delivery Support – ATM, ACH & EFT.
- Back Area Support – Bank by Mail, Savings Account Support, Monetary Transaction Support, Retirement Account Support.
- Assisted with other implementation and testing issues prior to cutover to Systematics IMPACS System.

Home Savings

Home Savings was a major Savings and Loan institution. It is now part of Washington Mutual, a national financial institution.

Corporate Accounting assistance in the training, testing and implementation of the Systematics System:
Performed *Warroom* analysis on Corporate Accounting areas to determine the functions that would need policies, procedures, and work instructions when Systematics Real Estate System is implemented.
Documented procedures for reporting to Fannie Mae, Freddie Mac and other investor groups.
Prepared training program and materials for Corporate Accounting staff.
Assisted with other implementation and testing issues prior to cutover to Systematics Real Estate System.

Education

LACCD – Los Angeles Community College District

Assisted with the development of standards for documentation of the following new system upgrades:
Financial Information System
Human Resource Information System
Student Information System

UCLA Finance Departments

Assisted with the development, conversion and implementation of a new grant system program for the tracking of all financial transactions. This embodied all phases of federal, state, corporate, and private endowments.

Developed and created a full capacity multimedia training presentation for all 330+ on-campus departments covering the administration of vendor purchases, authorization, reporting, and receiving of products and services – an annual budget of $1.3 billion. The system had measurements identified to assist in performance evaluations.

Engineering, Industrials & Construction

Fluor Daniels

Analysis and development of procedures for a sophisticated Accounts Receivable System providing cost reporting on statements to clients:
- Developed system whereby costs could be tailored to the client's specific requests, detailing labor hours, costs, rates, etc., in any desired combination.
- Prepared Supervisor Training Materials for the system.

Cal Mat Company

Analysis and development of standards for general policies and procedures for the corporate organization, providing electronic distribution to approximately 50 sites.

Media/Entertainment Industries

The Association—Los Angeles

Alpine of America—assisted with the initial relationship of Sales & Marketing. Developed training and strategic forecasting with their Circuit City relationship.

Whittaker Wellness—assisted in improved performance of Call Center scripting and relationships.

Norm Taylor Law Office—assisted with overall business plan for release of new marketing and sales tools.

Chet Eccles Software—assisted with overall marketing penetration of product potential sales channels.

Assisted with the overall strategy of The Association for response to Ecommerce business plan and other areas.

Dr. Adnan Al-Saleh

Designed and developed initial website for only property sales and rentals in Kuwait City, Kuwait.

Hollywood Reporter

Special analysis of the MIS Area for the Reporting of Income and Expenses.

Food Processing

Presto Foods Inc

Development of Procedures Manual for Accounting Computer Systems:
- Developed and wrote user guides for Purchasing, Receiving and Systems Master Files.
- Interfaced with data processing personnel and user group.
- Developed manuals that would easily communicate the use of terminals and keyboards to users.
- Developed the framework and standards for documentation of systems which were being developed. This assured future documentation would adhere to existing documentation standards as systems were developed and documented.

Food Stores

Food 4 Less / Alpha Beta Markets

Development of Manual System for Implementation of Training of IPMS System:

- Developed Computer Manual, Forms Manual and Task Manual for the implementation of a new, integrated point-of-sale system that coordinates the activities of numerous end users: buyers, merchandisers, outside vendors, and data entry personnel.
- Update and maintain store price books, tags, scanning, etc.
- Developed flow charts showing how the system works with regular business functions of the corporate office, stores and warehouses.
- Assisted in streamlining and coordinating advertising effort across the region.

Government

County of Orange, California – Board of Supervisors & Hall of Administration

Warroom: User Analysis of Network System:

- Developed outline of user Quick Reference Guide for understanding both hardware and application of VAX, PC and MAC environments.
- Developed guidelines for greater user ownership and use of network technical support team in day-to-day "trouble shooting."
- Developed detailed policy and procedures for system hardware and software.
- Developed network wiring diagrams for Hall of Administration.

Hospital/Health Care

Blue Cross of California

Systems analysis of end-users for Marketing Systems:

- Defined requirements for migration to new system.
- Analyzed current marketing system.
- Documented necessary modifications for migration.
- Represented users in interface with DP.
- Analyzed current documentation and recommended revisions.
- Performed analysis and made recommendations for "fallback" manual system and subsequent conversion during interim period, when interface to the new system would not be available.

Cedars-Sinai Medical Center

Development of System Flows for Patient Care System (PCS).

- Developed the overall system flow for the Admission, Discharge and Transfer System (ADT). Approximately 500 screens that had complex menu and option flows were mapped to show users the various paths through the system.

Gilead Science

Training
 Supplied all five APICS CPIM training modules.
 Supply chain consulting and other support (CTI).

Kaiser Permanente Health Plan

CARE Project:

- Performed procedures analysis, system design, testing and documentation of a Major Health Appointment Scheduling System.

Trained nursing staff for opening of new medical center:
- Trained approximately 250 nurses and other personnel on four major computer systems to prepare for the opening of the Woodland Hills Kaiser Medical Center.

Summit Health Care

Development of Business Office Policies and Procedures Manual:
- Standardized business office policies and documented these policies for a large national health care company.
- Coordinated with the users from several sites, corporate officers and data processing staff.

Daniel Freeman Hospital

Developed basic training materials for the implementation of an integrated system.

Established overall Training Documentation Standards for the implementation of a new integrated system for three major facilities in Southern California.

Assisted the designated experts in the development and production of all training materials for their specific areas of expertise:

Accounts Payable	Accounts Receivable
Contract Management	General Ledger
Human Resources	Laboratory
Materials Management	Materials Management
Medical Records	Order Management
Patient Billing	Patient Processing
Payroll	Pharmacy
Physician View	Radiology
Reporting and DBA, TBD	Scheduling Dept. Profile
Trendstar	Utilization Management

Medical Device and Instrument Manufacturing

Medtronic MiniMed

MiniMed in Northridge, CA, manufactures insulin pumps with automatic glucose monitoring capabilities.

Telecom Automatic Call Detection and Routing

Investigated and documented:
- ACD system and component architecture
- Call Center scripts for Clinical, IT and Customer Service
- System Function and Failure modes
- Call Center equipment move, add and change processes

St. Jude Medical

St. Jude Medical in Sylmar, CA manufactures implantable devise such as pacemakers, leads and implantable cardioverter defillibrators (ICDs).

Telecomm Department

- *Warrooms* to determine needs and priorities for:
  Policies
  Processes and procedures
  Knowledge Management and Knowledge Content (SharePoint)
  Internal Audit

Standards for Telecomm functional area
Video Conferencing
Email (Exchange) enhancements to enable Unified Messaging
Intranet Bulletin Board for IT Help Desk
System backups
Call Center and Support activities

- Created online Conference Room scheduling site to enable users to view and get critical criteria for each room before scheduling for a meeting.
- Established standards for identifying and labeling cabling.
- Established standards and procedures for individual station setup (add, move and change).
- Diagrammed and documented telecomm system architecture and infrastructure including maps for vendors (three campuses).
- Developed check lists for troubleshooting video conferencing and conference rooms.
- Created basic templates for standard documents.
- Diagrammed and documented Automatic Call Detection and splits.
- Created Telecom User Guide.
- Created Voice Mail User Guide.
- Diagrammed and documented IT (including Telecom) Capital and Expense purchasing processes.

Networking Department

Investigated and documented:

- Access layer and core switch standards
- Network cabling and labeling standards
- Network modification, equipment disposal and monitoring, and vendor maintenance contract processes
- VPN new user and site-to-site set up processes
- Network troubleshooting process
- Core and access layer switch installation and configuration procedures
- Network backup process
- Wireless server unloading, rebuilding and reloading processes
- Firewall break, fix, and modify processes. Firewall policies and procedures.
- Wireless LAN interface reference, access point and bridge installation and configuration processes.

IT Help Desk

- Researched and created major troubleshooting processes and created Help Desk Quick Reference Guide for Help Desk personnel to identify and expedite problem resolution

Manufacturing

American Honda Corporation

Business and Procedures Analysis for "AMPS" (Automated Motorcycle and Power Equipment System):

- Performed an analysis of multi-departmental distribution-related activities, system testing and training of Honda staff.
- Documented 27 areas of company operations.

Communications Effectiveness Study:

- Performed an analysis of National Dealer Development's Publication System, relating to all American Honda dealers (automobiles, motorcycles, power equipment, etc.). Twenty-seven manuals were covered in this project.

- Recommended system revisions which would result in increased dealer effectiveness.

American Isuzu Motors, Inc.

Developed End-User Documentation for a Dealer Preference System:
- Developed the end-user documentation for input from US dealers to both national and regional distribution and sales managers.
- Coordinated with data processing personnel and users to develop this manual with tutorial, reference and checklist documentation.

Courtaulds Aerospace

Established procedures, training and documentation:
- Established Inventory Cycle Count procedures in preparation for a pending implementation of a new integrated software system.
- Assisted in the development of training and system documentation for the overall organization.

Del Mar Window Coverings, Inc.

- Developed and wrote user guides for financial systems, coordinating with data processing personnel and users. The objective was to document the user-selected options and correct usage of a purchased package.
- Coordination of Sales & Marketing tool to the user community.

Eastman Kodak

Developed End-User Documentation for SWIFT System:
- Developed the end-user documentation for a totally automated and highly sophisticated warehouse system. A documentation "Library", which fully covered all aspects of the system, and a Maintenance Manual, which facilitated easy updating of the Documentation Library by the client, were developed.

Epson America

Epson America distributes printers, consumables (ink, paper), multimedia projectors and scanners for home and business use. CKI started working with Epson America in 2007.

Sales and Marketing

WarRooms in the Long Beach USA headquarters:
- Identified major areas of concern.
- Recommended detailed actions to eliminate, simplify, complete and certify transactions for the Sales, Sales Operations, Credit and Customer Relations departments.

Ink Packaging and Distribution in the U.S.A.
- Did on-site consumable supply process analysis of the three main US sites.
- Performed deep analysis of the consumables inventory forecasting and procurement.
- Identified disparate inventory data among several systems.
- Created detailed flow analysis of the information supply chain, ink demand forecasting, order fulfillment, production, cycle count, sales updating, media demand forecasting and media supply chain processes.
- Created 15 critical action items for the three sites.

Excellon Automation Company

Developed Intranet spare parts inventory for customer and staff use:
- Analyzed top-selling parts of 10,000-part inventory for inclusion in online inventory, and digitally photographed top 1000 parts.
- Manipulated graphics images to include part numbers and cross-referenced part numbers.
- Identified and digitally photographed 50 key machine subassemblies, graphically edited photos to include machine model and critical part numbers.

- Delivered digital images to IT department for deployment onto Excellon's Partlink website.

Grow Group, Inc.

Developed Procedures Manual for Inventory and Financial Computer Systems:
- Developed and wrote user guides for Inventory and Financial Systems, coordinating with data processing personnel and a user group. Approximately fifteen systems were documented.
- Researched and consulted with programmers and users to determine the capabilities and options of the system.

Huhtamaki Packaging

Training
 Delivered four modules of APICS CPIM training to middle management (CT).

International Rectifier, Inc.

International Rectifier is a global organization that has re-engineered and restructured its North American divisions (approximately 3,500 employees), as well as some of its global processes. CKI performed global financial restructuring of 18 international divisions and other projects as follows:

Shared Service Center

From 2003 to 2006, collaborated with in-house SMEs and external consultants in the analysis, mapping and strategy to implement the Shared Service Center for 19 world-wide sites.

Major part of team which investigated and documented current processes for:
- Accounts Payable
- Accounts Receivable
- Fixed Assets
- General Ledger
- Inventory Control
- Inter-company AP processing

Major part of team which designed and documented best practices to be processes for:
  Accounts Payable
- Implemented ACH payments to vendors
- Implemented Purchasing Cards
- Implemented Invoice Processing workflow

  Accounts Receivable
  Fixed Assets:
- Specified upgraded Construction in Progress and Fixed Asset systems
- Documented CIP and FA systems (AS400)
- Designed, programmed and fully tested system for fixed asset barcode tagging utilizing a handheld barcode scanner and data collection terminal
  New assets
  Accept assets into production
  Audit assets
  Dispose of assets
  Transfer/Receive assets
- Designed and created training courses and manuals for fixed asset users.
  ▪ General Ledger closes

Fixed Assets

- 1997- 1998 - Established a Fixed Asset Department for the main division by performing the following tasks: Analysis, new policies and procedures, re-engineering the authorization/approval process, inventory controls, established full asset reporting, and

measurement processes for performance recognition. We also performed the required coordination and alignment of Purchasing, Receiving, Accounts Payable, Cost Accounting, General Accounting, Finance, Tax Audits and upper management to manage approximately $700 million in fixed assets. CKI also provided training to management, as well as to departmental supervisors and equipment custodians.

General Ledger

- 2001- 2002 – Assisted with implementation of a new global General Ledger, Chart of Accounts and restructuring of the Accounts Payable department. CKI performed analysis and review, produced work instructions, policies and procedures, reports, and forms to facilitate the project in the North American division. CKI assisted with the generation of reporting by establishing controls, reports and reconciliation processes. Assisted with all phases of conversion.

Return Material Authorization

- 1997 - 1998 - Performed analysis and establishment of new Return Material Authorization procedures. This included required coordination and alignment of delegation of authority, Sales and Customer Service, Accounts Receivable, Receiving, Quality Control, Audits, and General Accounting areas. All departments are able to view all return authorization activities as they occur, versus prior, when reporting data was 30-60 days old. Implemented the first phase of an imaging process to record the physical condition of returned product. Training and documentation also produced.

Sales & Marketing

Design and development of Sales Commission reporting to handle both domestic and international accounts.

Assisted with streamlining the analysis of major sales channels by product type for three critical channels.

Inventory Control

- 2004 – 2005 - Sarbanes Oxley review of all processes and process maps of Cost Accounting Sarbanes Oxley audit.
- Troubleshoot of Mexico inventory systems. The facility was using various disparate systems that were being coordinated via an unwieldy Excel spreadsheet system. Made recommendations for revised approach. Also audited entire WIP (Work in Progress) and inventory.
- Performed global WIP inventory to confirm against accounts.
- Documented standard costing system and how the system is executed with their ERP (Enterprise Resource Planning) system (Vision).
- Created documentation for:
    Reference categories
    Standard costs
    Manufacturing Order combines, splits, issuing components and rework
    WIP Valuation
    Scrap
    Receiving Raw Material
    Pick, pack and ship
    Inventory adjustments
    Reporting variances

Other

- 1998 - Developed and established a Finance/General Accounting Reference On-line Library for use by all internal and external departments of the North American division. Currently, several

modules are in place and used on a regular basis. Provided training to key IR personnel, so that the user community can maintain its on-line library content.

- 1998 - Developed numerous reports that unified data from various computer platforms, which were not previously integrated, so that departments and upper management could effectively manage their areas. Some of the areas affected were Sales and Marketing, Customer Service, Accounts Payable, Accounts Receivable, Finance, Accounting, and Cost Accounting, on a global as well as divisional basis using ACquire, Crystal Reports, Access, and Lotus reports for both upload and download to AS/400 and network platforms. Training was provided to some users so they could create their report requirements as needed.
- 1998 - Assisted in the development of policies and procedures for implementation of a new global forecasting methodology to more accurately reflect the future product needs of OEM and Distributor customers. Developed training materials for self-help, as well as delivered training.
- 1998- 1999 - Established new policies and procedures, as well as extensively detailed reporting, for customer credit and debit transactions for both inter-company and external company bases.

National Cement Company

- Development of End-User Documentation for the Bill of Lading Screen:
- Developed the user manual for the Plant Operating and Inventory Control System.

RB Industries (Furniture)

Developed User Documentation for Order Entry System:

- Designed and developed the documentation for the integrated Order Entry, Accounts and Inventory System encompassing the RB furniture stores, marketing, warehouse, and accounting areas. Manuals were specifically designed for each area.
- Documented business procedures as part of this project.

Siemens Solar Industries

Siemens' facility in Camarillo, California, produces about 38% of the world's photoelectric cells (solar cells). When it needed ISO 9000 documentation support, it turned to CKI.

CKI produced standard ISO 9000 procedure documentation for Purchasing, Warehouse and Sales Order Administration. Since the standards were set at the beginning of the project, all the documentation has the same "look and feel," as well as meeting all the ISO 9000 requirements for those areas. The documentation is aligned to fit with existing certified and approved ISO 9000 requirements.

Superior Communications

Superior manufactures and supplies a full line of wireless products and services to major wireless carriers, OEMs and retailers with over 200,000 square feet of facilities in Irwindale, California.

In the fourth quarter of 2015 CTI delivered training to fifty middle management personnel, including three Basics of Supply Chain Management courses, one course in Detailed Scheduling and Planning, one course in Master Planning of Resources and one course on procurement.

Mining Industry

FMC Gold

As part of a corporate consolidation effort:

- Debriefed all employees involved with critical mining operations at two remote sites. Identified all critical job functions, responsibilities, reports, and other knowledge critical to the organizations. Fully documented all roles and responsibilities relative to daily functions, so they could be relocated to corporate offices.
- Assisted in the preparation of a disaster recovery plan for the entire enterprise, including corporate and remote mining/exploration operations. This was done on network and AS/400 platforms.
- Assisted in the development of a strategic MIS plan to consolidation that function corporate-wide.
- Documented all exploratory software applications which had been developed by third-party vendor. This included applications critical to the strategic success of the organization — approximately 20 applications.
- Assisted in the implementation and documentation of the Corporate Network System. This included all aspects of network operations.

Petroleum Industry

Arco Petroleum Products

Developed Procedures Manual:

- Designed and developed a manual for the AM/PM Mini Mart Accounting System. The manuals were distributed to 500 marts throughout Southern California.

Developed Procedures Manual for Inventory and Financial Reporting System:

- Developed the user guides for an Inventory and Financial Reporting System, to be used by the Inventory Control and Marketing groups.
- Coordinated with data processing personnel and a user group to develop this manual.

Conoco Phillips

Los Angeles Refinery Business Recovery Plan:

Designed, developed and produced the pilot Business Recovery Plan documentation for the Los Angeles Refinery servers.

SharePoint Implementation

- Designed and taught taxonomy (categories and indexing) for the Los Angeles Refinery documents.
- Oversaw the installation and configuration of the SharePoint server software.
- Designed, created and taught SharePoint user courses including:
  Dashboard creation
  Getting Started Guide and procedures
  Personal Dashboard setups
  Managing content

Policies and Procedures

- Created the manual and courses for the Refinery Information Services polices and procedures.

Santa Fe International

Developed User Documentation for Preventive Maintenance System:

- Established User Documentation Standards for this large international company's wide range of users.

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- Designed and developed the documentation of a large system that encompassed the Oil Rig Preventive Maintenance System.

Unocal Corporation

Developed overall Policies and Procedures for Fixed Assets, as well as general guidelines to be used corporate-wide in the request and relocation of employee offices.

Developed and prepared overall policies and procedures for Problem and Change Management Program for MIS and the user community. Addressed the establishment and maintenance of the Customer Service department for the corporate facilities.

Utilities

Department of Water and Power, Los Angeles, California.

Developed Administrative and Computer System Procedures:
- Developed Manual Office Procedures and Computer Procedures for the Purchasing System, including approximately eleven sub-systems.

Section 2. Knowledge Management (Content / Packaging / Online Help)

Allergan

Developed the user manual and on-line documentation for the Human Resources Professional Access System which is comprised of their HR records.

Alpharel, Inc. – Alpha Scan.

Program Documentation (image storage and retrieval system).

Alpine Electronic of America

Sample Sales and Training Tool.

California Commerce Bank

Converted the policies and procedures of thirteen major banking departments to on-line documentation.

Updated the policies and procedures prior to the conversion from paper to electronic.

Provided extensive training and support for the on-line documentation system.

California Savings Bank

Moved six departments to on-line documentation:

Branch Operations	IS Manual
Loan Processing/Servicing	FISERV
Appraisal	Administration Manual
Security Manual	

Cedars Bank

Retail Operations Policies and Procedures
Information Technology Policies and Procedures
On-line Documentation – FISERV

Conoco Phillips

Researched and selected knowledge management tool (Microsoft Share Point), set up tool. Coordinated with user groups to develop taxonomies and migrate the data so it was easily accessible.

Daniel Freeman Hospital –
Pharmacy Pilot Project.

Datalogixs / Oracle Software
Production Documentation:
Created seventeen manuals which comprise the Cimpro Application.
Created on-line library for the manuals.

International Rectifier

Accounts Receivable	Fixed Assets
Accounts Payable	Return Material Authorization
General Ledger	

ITT Gilfillan – Quality Control

Quality Control Systems and Area	Material Planning
Accounts Payable	Stock Room
Procurement	System Interface

Perkin Elmer
Pioneer Infra Red Analyzer Products, Product Documentation:
Installation
Calibration
Software/Artificial Intelligence Modeling
Management
Marketing Coordination

Quark Inc.
Financial System:
Created a Consolidation System for the World-Wide Controller which took the production of the monthly Balance Sheet and Income statement from 12 hours to 15 minutes.
Provided GL technical support for Oracle 11 to Oracle 12 conversion.

Rosemount Analytical – Product Documentation
Six NGA 2000 Analyzer Products:
Installation
Calibration
Maintenance
Management

Southern California Bank
Branch Operations
Lending/Credit Operations
Retail Operations
Audit

Wyle Labs
Quote and Contract Software Systems

Section 3. User Training
(Processes & System Implementation)

Carlton Forge Works

Assisted in the preliminary steps to define and develop user request results on the supply chain. Oracle implementation.

Daniel Freeman Hospital

CKI assisted in the development of content as well as the creation of training materials for the conversion and implementation of a fully integrated Hospital Administration Software System. Training of trainers and user community of approximately 900 people. Functional areas affected:

Nursing	Radiology
Claims Processing	Pharmacy
Business Office	Billing Process
Collections	Medical Records
Admissions	Financial Management
General Accounting	Audits

Farwest Savings & Loan

Branch Operations	Lending Operations
Major Loan Operations	Corporate Holdings
Implementation	Accounting/Finance
Branch Support	

Southern California Savings & Loan

Branch Operations
Computer Operations - ACquire Report Related

Kaiser Permanente Health Plan

Provided trainers to deliver a three-week program to 600 nurses for the opening of a new clinic and hospital.

American Honda Corporation

Assisted in Motorcycle Division Training Development and Training Program.

Circuit City Road Shop – Training for Alpine of America Audio/Stereo Product.

Provided video and hard copy training for 3,500 to 4,000 counselors on the same implementation day, in conjunction with **The Association** of Burbank, California.

Allergan

Human Resources Employee Systems
Forms Manual to be used for Reporting

GTE Contel

Provided overall training for remote US Government satellite sites worldwide.

International Rectifier – North America Division

Fixed Assets – El Segundo	Commissions
General Ledger – El Segundo, Temecula, Tijuana Mexico	Cash Management
	Receiving
Accounts Payable - El Segundo, Temecula, Tijuana Mexico	ACH Vendor Payments
	Automated Invoice Processing (Image
Accounts Receivable	storage, retrieval and workflow)

Return Material Authorizations   Purchasing Cards

UCLA

Multimedia self-directed training for approximately 3000 users of a new Financial Management and Procurement package.

Fluor Daniels

Developed training material for a worldwide construction system.

Section 4. Technical Documentation – System / Product

Acquire - West Group Management	Orange County
Citicorp (TTI)	Optical Research Associates
Datalogix International	Perkin Elmer Corporation
Home Savings Of America	Phoenix Software
St. Jude Medical	Rosemount International
Kendall McGaw	Transamerica Occidental
K Swiss Corporation	Life Insurance Company
Logicon	Yamaha International
Minimed Medtronics	

Summary of Work Performed

The following is a summary of work performed for the above companies. We will be happy to supply you with a detailed account of work performed for each company.

Development of Error Code Documentation for Application Generation System.

Tech Support Documentation — Used by technical support services and project control for 25 technical support projects for a large system modification project.

Documentation of Technical Standards for IS Department — Analysis and documentation of technical standards for a large data processing department. Procedures included Production Control Standards, JCL Standards and Computer Room Standards.

Technical Documentation of Fourth Generation System — Documentation for a fourth generation language system comprised of approximately 400 programs, including Accounts Payable and Inventory Control.

Technical Manual Review and Revision and Redesigning — Documentation Library for Optical Lens System, Backup Procedures, and Workflow.

Technical Documentation (SDM) for AMA System — System External Specifications (SES) and System Internal Specifications (SIS) using system development methodology guidelines for UPIN SYSTEM.

Network Documentation — Electronic Library framework for User and Technical Documentation Manuals, Quick Reference Guide, Policies & Procedures for technical personnel on hardware, and application for VAX, PC, and MAC environments, as well as uploading to mainframe systems. Trained personnel for manual maintenance.

Technical Documentation Software Product — A New York company, industry leader in manufacturing software and integrated modules for a complete manufacturing solution for pharmaceutical and chemical organizations, needed twenty-two manuals updated to reflect changes in their software and to increase maintainability – four feet of documentation binders on a shelf! CKI converted these manuals into leading-edge hard copy and soft copy documentation. The formatting across the manuals is now totally consistent, and context-sensitive Windows Help is now fully implemented for each manual.

Technical Manual Conversion to On-line Help — Standard environmental measurements and sample analysis are the lifeblood of many industries. This company produces a broad international line of analytical equipment for environmental monitoring.

CKI converted the six NGA 2000 Analyzer Manuals to consistent, updated and easily maintainable hard copy manuals as well as Windows On-line Help Manuals. These manuals addressed technical, operational, and management issues. These manuals and Help will be distributed to both old and new customers; the consistency within the documentation enables our client to respond rapidly to industry changes.

Network, telephony, building keying and security systems inventory and documentation. Part of Sarbanes Oxley compliance.

Inventory of all system requirements for Sarbanes Oxley compliance.

Conference room location and equipment (i.e., audio visual, telephone, computer) profiles/inventory for Microsoft Exchange email-conference room scheduling system.

Inventory and compilation of call center scripting and automated menu/messaging scripts.

Section 5. Seminars & Corporate Warrooms
(Facilitation & Lean Continuous Improvement)

Alltec/Nations Bank — Charlotte, North Carolina
Alpine Electronics of America – Gardena, CA
California Commerce Bank – Century City, CA
CAP Barbell — Carson, CA
California Savings Bank – San Francisco, CA
Carlton Forge, Industry, CA
Cedars Bank – Los Angeles, CA
Columbia Savings & Loan — Newport Beach, CA
County Of Orange, Hall of Administration — Santa Ana, CA
Courtaulds Industries — Glendale, CA
Courtelds Chemical – Glendale, CA
Daniel Freeman — Inglewood, CA
Datalogix International – Syracuse, NY
Datalogixs International – Rochester, NY
Farwest Savings & Loan — Newport Beach, CA
Fidelity Federal Savings & Loan Assn. — Burbank, CA
Fluor Daniels – Irvine, CA
Food 4 Less/Alpha Beta – Los Angeles, CA
First Fidelity Federal – Santa Monica, CA
FMC Gold — Reno, Nevada
GTE-Contel Corporation – Marina Del Rey, CA

Home Savings & Loan Association — Irwindale, CA
Huhtamaki Packaging — Los Angeles, CA
International Rectifier – El Segundo, CA
Los Angeles Community College District – Los Angeles, CA
Medtronic MiniMed, Northridge, CA
Perkin Elmer Corporation – La Verne, CA
Phoenix Software – El Segundo, CA
Product Research – Glendale, CA
RMSA – Riverside, CA
Rosemount Analytic – La Habra, CA
Siemens Solar Industries – Camarillo, CA
SmithKline Beecham – Los Angeles, CA
Southern California Bank – Los Angeles, CA
Southern California Savings & Loan – Beverly Hills, CA
Standard Abrasives – Northridge, CA
Teledyne Industries – Van Nuys, CA
UCLA – Westwood, CA
Unocal – Brea, CA
Ushio America – Cerritos, CA
Wells Fargo Bank – Phoenix, AZ
Whittaker Wellness Center — Orange, CA
WHPM Medical — Irwindale, CA
Wyle Labs – Irvine, CA

Section 6. Documentation Maintenance

GTE - Contels Corporation.
Updated Operations Forms/Procedure Manuals - High Security Training for all communication centers worldwide.

ITT Gilfillan.
Updated MRP II Manual Documentation to comply with recent changes to MRP-G System. Used for government audits.

Section 7. APICS / Lean Training (State ETP Training)

Farmer Brothers Coffee—Torrance, CA. All five modules.
Hain Celestial—Culver City, CA. All five modules
SnapOn Tools—City of Industry, CA. All five modules
Huhtamaki Packaging—Los Angeles, CA. All five modules
Teledyne Electromagnetic—Marina Del Rey, CA. BSCM
CAP Barbell—Carson, CA. Lean
Gilead Sciences—San Dimas, CA. All five modules.
WHPM Pharmaceutical—Irwindale, CA. Lean.
Hemosure Pharmaceutical—Irwindale, CA. Lean.