

NOVEMBER 2010 ▶▶

Smart Growth: Critical Metrics in Organic Expansion

Organizer

Ngozi Irondi, Executive Vice President, **NRC International, Inc.**

Presenters

Raymond Roberts, Chief Executive Officer & Co-Founder, **Citizant, Inc.**

Peter Michaels, Founder & Managing Director, **Toh Michaels Private Wealth Management, LLC**

Growing a company organically takes an enormous commitment of resources and time. It means that the company is expanding its business through the use of its own resources and assets. Equipment must be acquired, personnel hired and trained, and sales channels established. Organic growth allows company executives to set and achieve corporate goals in whichever manner they choose, stay in complete control of the company, and steer the business in a specific direction to achieve their objectives. In driving the business, there are specific metrics (revenue, headcount, business development, marketing, and quality) that executives must keep their eyes on in order to remain in a positive trajectory. CXO Forum members can expect to learn about and discuss:

1. Determining your business growth strategy
2. Leading with sales and marketing
3. Investing in your delivery organization and infrastructure
4. Re-inventing your management team and yourself
5. Financing and cash flow



Raymond Roberts leverages nearly 25 years of significant entrepreneurial, financial, sales, management and business experience. He is CEO and co-founder of Citizant Inc., founded in 1999 with business partner and former Texas Instruments colleague Alba M. Alemán. Within five years the company had 50 employees, was serving more than 10 government customers, and had revenues exceeding \$10 million. Citizant has been recognized nationally and locally as one of the fastest-growing businesses in Greater Washington; since 2003 it has been listed annually as one of the fastest growing and largest Hispanic-owned businesses in the country by Hispanic Business; and it was ranked No. 1 by *Washington Technology* on its Fast 50 list as a result of achieving five consecutive years of nearly 200 percent annual growth. Since the early 1990s, Mr. Roberts has been a founder, owner, and senior officer of four information technology and government services firms, including Citizant.



Peter Michaels has more than two decades of experience developing and implementing wealth management strategies and investment portfolios for ultra high net worth families and their companies. He is Co-Founder and Managing Director of Toh Michaels Private Wealth Management and his clients include real estate developers, business owners, hedge fund managers, and private equity principals. Mr. Michaels also has considerable expertise in M&A, business strategy, business valuations, corporate finance, and estate and federal income tax planning. Previously, he was Senior Vice President at HSBC Private Bank, Senior Private Banker at Citi Private Bank, and Managing Director in the Washington, DC office of the merchant banking firm MSM&C. Mr. Michaels is a Certified Public Accountant and holds NASD Series 7 and 65.

CXO Forum 10-11 SERIES

JOIN US!

THURSDAY
NOVEMBER 11
2010

7:30am to 8:00am
Networking and
Continental Breakfast

8:00am to 9:00am
CXO Forum
Panelist(s) Presentation

9:00am to 9:15am
Burning Issues

*Discuss your specific
issues and challenges
with colleagues and
fellow CXO members*

Location
Cherry, Bekaert, &
Holland
1934 Old Gallows Road
4th Floor
Vienna, VA 22182
703-506-4440
For directions, visit
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CXO Forum

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BRING A GUEST!

Inquire about volunteer opportunities in CXO Forum today!

Neal G. Koller

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MARK YOUR CALENDAR FOR THE SEASON!

SEP	September 16, 2010: Mergers & Acquisitions
OCT	October 14, 2010: Executive Leadership October 28, 2010: CXO Forum Fall Membership & Social Evening
NOV	November 11, 2010: Smart Growth: Critical Metrics in Organic Expansion
DEC	December 9, 2010: Maneuvering in the 2011 Economic Environment
JAN	January 13, 2011: Financing Growth (i.e., sources, types, debt/equity)
FEB	February 10, 2011: Global Opportunities
MAR	March 10, 2011 Sales and Marketing Organization
APR	April 14, 2010 CXO Forum Roundtable
APR	April 28, 2011 Spring CXO Forum Membership Drive & Social
MAY	May 12, 2011 Talent: The ABCs in Your Team
JUN	June 9, 2011 Successes & Failures of Explosive Growth: Voices of Experience

**DON'T MISS THE
YEAR-END CXO FORUM
PRESENTATION
DECEMBER 9:**

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Maneuvering in the 2011 Economic Environment

What's Ahead for the U.S. and Washington on Jobs, Housing, Growth Sectors, and More

Organizer

Alicia A. Sutton, Executive VP/Chief Strategy Officer, **Omnia Education**

Presenter

Stephen S. Fuller PhD

Dwight Schar Faculty Chair and University Professor
Director, Center for Regional Analysis
School of Public Policy, George Mason University



Stephen S Fuller PhD

Described as the “Go-To” economist for the Washington region, Stephen S. Fuller, PhD., knows what lies ahead—for Washington and the nation. This month, Dr. Fuller will engage with CXO members and guests during his 2010 economic outlook presentation and discussion. Come join the dialog and learn from a renowned economist what lies ahead for Washington.