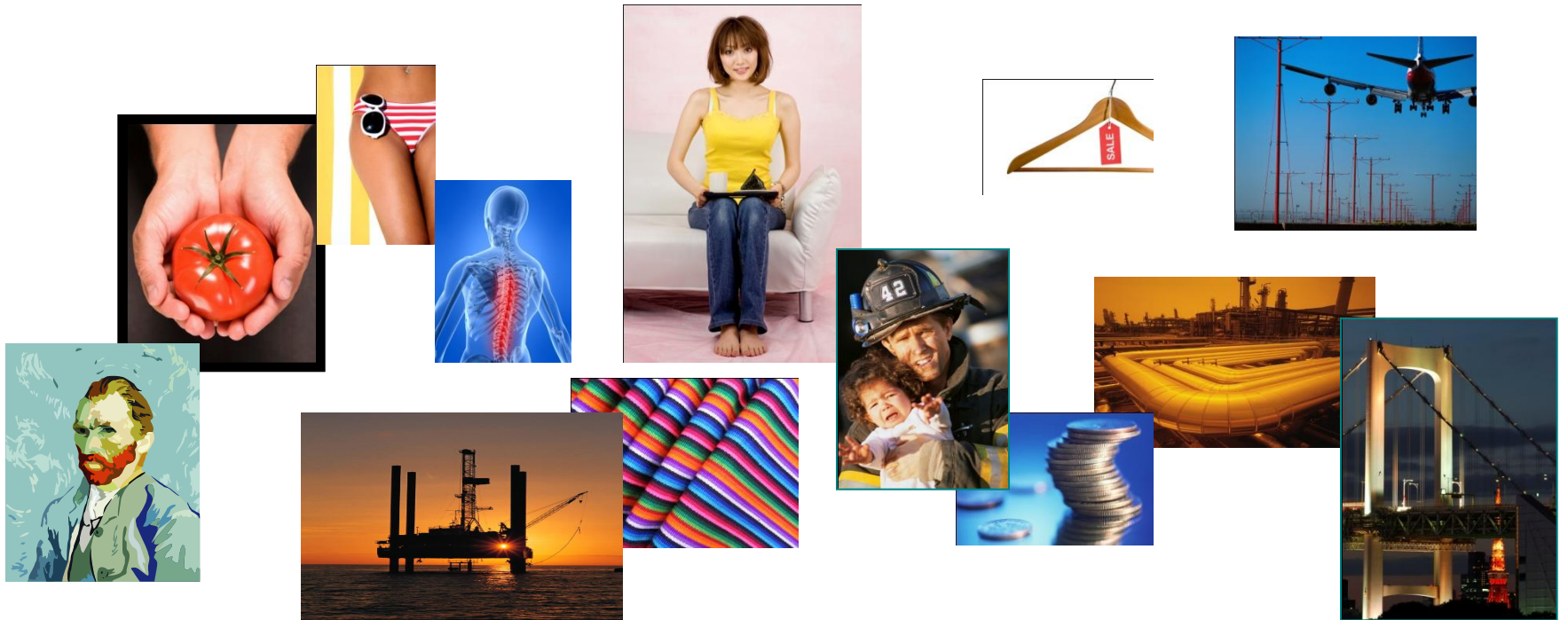


# Industry Experience



# Agriculture



Agricultural business, or “Agribusiness”, is a generic term referring to the businesses involved in food production including farming, seed supply, and agrichemicals. Related industries include manufacturing of farm machinery, wholesale and distribution, processing of food, marketing, and retail sales.

Agricultural business is large-scale, industrialized, and sometimes a vertically integrated food production network of organizations. While similar in some respects, agribusiness is distinctly different the traditional “family farm” in terms of scale and scope.

Biofuel and energy crops represent new business growth areas for agricultural business. Government restrictions and incentives remain a constant watch-point for this industry. Global trends, transportation costs, and equipment costs must be considered carefully for profitability. Conservation, especially related to water supply, may be an elevated business factor in certain regions of the world.



- **Crop Production**
- **Animal Production**
- **Forestry and Logging**
- **Fishing, Hunting and Trapping**
- **Support Activities for Agriculture and Forestry**

*Emerging topics relevant to agribusiness include genetic engineering and renewable energy.*

# Oil & Gas / Mining



Mining includes the extraction of minerals from the earth. Material recovered by mining include bauxite, coal, copper, gold, silver, diamonds, iron, precious metals, lead, limestone, nickel, phosphate, oil shale, rock salt, tin, uranium, and other minerals.

Safety remains a top priority and #1 business issue for organizations in the mining sector. World markets both on the supply side and the demand side provide large swings in cost pressure and revenue opportunity. Trading organizations and hedge funds influence prices. In particular, costs of fossil fuel including natural gas, petroleum oil, and coal are significantly influenced by supply/demand along with expectations of future markets.

Market uncertainty, public opinion, cost pressure, government regulation, and globalization each impact the oil & gas sector as well as other mineral mining operations.

*Talent acquisition, cost of talent, and related topics are increasingly becoming top-of-mind business issues faced by oil & gas organizations and other mining operations. As Baby-Boomers near retirement age, a talent gap widens in most energy-based companies and mining operations.*



- **Oil and Gas**
- **Mining**
- **Support Activities for Mining**



# Utilities

The utility sector includes public organizations maintaining infrastructure for public service and for-profit organizations, including privately-held firms. Public utilities are subject to forms of public control and regulation. Parts of the sector operate in a market-based context.

The term utilities refers to electricity, natural gas, water and sewerage. While historically, telephone services have sometimes been included in the umbrella sector of “utilities” – they are not included in this summary.

Elevated emphasis and public attention toward climate change, alternative and cleaner forms of energy, as well as market supply and demand put a strain on operations decisions and profitability. The well documented aging workforce crisis is increasingly an issue within the electric and gas utilities in the US.

*Emerging topics of interest alternative energy, regulatory changes, talent management, knowledge management, business process outsourcing, field automation, and asset management systems. For organizations transition from regulated to deregulated enterprises, marketing operations, customer relationship systems, and billing systems become elevated needs.*



- **Electric Power**
- **Natural Gas Distribution**
- **Water Sewage and other Systems**

# Construction

The construction industry includes architectural and civil engineering. It requires intensive use of manpower and machinery. Construction includes making buildings and assembling infrastructure such as a road, bridge, pipeline, or similar distribution systems. Large scale construction requires keen project management with ongoing involvement from design engineers, and other specialists.

Effective planning is essential to the successful execution. Consideration of environmental impacts, and stakeholder approval/involvement are important. Scheduling, budgeting, site safety, availability of materials, logistics, and similar factors must be well planned and well managed.

Use of organized labor, contract labor, sub-contracting organizations, as well as non-unionized employees can present some complexities in the execution of the construction process.

Access to equipment and materials required for the construction itself are subject to transportation and logistic issues, cost variations influenced by global supply and demand, and government control.



- **Construction of Buildings**
- **Heavy and Civil Engineering Construction**
- **Specialty Trade Contractors**

*Emerging topics for the construction industry include concepts of "Green Building" and LEED certification/accreditation.*

# Manufacturing (Food & Textiles)

This broad industry segment includes organizations involved with the processing and manufacturing of food and textiles. For this summary, food includes any substance intended to be consumed by an animal or human. Textiles include flexible materials comprised of natural or artificial fibers – typically either thread, yarn, or from an animal origin.

Generally, this segment of manufacturing is best described as “process manufacturing.” Once the output is produced, it cannot be distilled back to its basic components. Once made, the end product can not be “taken apart”. This summary focuses on food, beverage, and some consumer goods.

Ingredients, recipes, and formulas are frequently proprietary. Efficiency of process – including consistency of output and quality assurance during the production process itself are important considerations. Final packaging and marketing of the end products are often emphasized. Because many of these products are intended for the consumer market, brand building, knowledge of the consumer, and advertising spend may be significantly elevated for this industry segment compared to many other segments.

*In recent years, web-based marketing has become a powerful tool. Because the manufacturing process itself uses a lot of energy, – these organizations also benefit from rethinking how when and why energy is used. Asset management systems and real estate/facilities management systems have become elevated areas of interest.*



- **Beverage and Tobacco Product Manufacturing**
- **Leather and Allied Product Manufacturing**
- **Apparel Manufacturing**
- **Food Manufacturing**
- **Textile Product Mills**
- **Textile Mills**

.....

# Manufacturing (Petroleum and Paper)

Refining is the process to transform a natural resource in a semi-usable form into a more pure form. Petroleum refining is sometimes referred to as “downstream” to the exploration, production, and transportation of petroleum within the oil and gas sector.

Paper manufacturing begins with “pulping” which separates the wood fibers. Pulping of paper can be accomplished in three basic methods: mechanical methods, chemical breakdown, or a combination of chemical/mechanical means.

Ethanol fuel can be made from common crops, such as sugar cane and corn. It is an increasingly common alternative to gasoline in some parts of the world

*Emerging topics for process manufacturing organizations include concepts of carbon footprint, commodity price volatility, financial hedging and risk management or trading sophistication, global demand, and new talent pool recruitment and training.*



- Petroleum refining
- Paper manufacturing
- Ethanol manufacturing

# Manufacturing (Equip and Machines)

Manufacturing is the making of goods or wares by manual labor or by machinery, especially on a large scale ... in which raw materials are transformed into finished goods on a large scale.

In both “discrete” and “make-to-order” manufacturing methods, the shop floor uses work orders to build the products. Examples include toys, medical equipment, computers and cars.

Low volume/high complexity production results in the need for an extremely flexible manufacturing system that can improve quality and time-to-market speed while cutting costs.

High volume/low complexity production puts high premiums on inventory controls, lead times and reducing or limiting materials costs and waste.

*Elevated topics include globalization and use of off-shore and near-shore partnerships or distributed organization. Cost of labor, along with asset intensive requirements for production make quality, speed, and efficiency paramount. Safety remains a top priority for this industry.*



- **Computer and Electronic Product**
- **Furniture and Related Product**
- **Electrical Equipment, Appliance**
- **Fabricated Metal Product**
- **Primary Metal**
- **Machinery**

# Wholesale Trade

Wholesale implies the sale of goods in quantity, in particular as to retailers or jobbers, for resale. The wholesale market provides an intermediary method for a collection of otherwise disparate goods into an organized single-batch shipment to a given end-user.

A wholesale organization may specialize in a particular type of good, or may be organized geographically. Because regulations vary state-to-state, and certainly between nations, trade and legal compliance are imperative for segments of the wholesale trade. Special circumstances such as refrigeration requirements or delivery speed may influence logistics planning, storage and warehouse configuration, and staffing,

Wholesalers are a key component of an overall supply chain – spanning all movement and storage of raw materials, work-in-process inventory, and finished goods from point-of-origin to point-of-consumption.



- **Merchant Wholesalers, Durable Goods**
- **Merchant Wholesalers, Nondurable Goods**
- **Wholesale Electronic Markets and Agents and Brokers**

*Because of the wholesalers position within the extended supply chain, there are many opportunities to distinguish the services through exceptional inventory management systems, tracking systems, and material movement management reporting.*

# Retail Trade

Retailing consists of the sale of goods or merchandise from a fixed location, such as a department store or kiosk. Retailing may include ancillary services, such as delivery.

Retailers typically gravitate to one of three primary strategies – low cost provider, customer intimate, or specialized products. Each strategy implies a variety of tactics necessary to complete the business model.

Low cost retailers must have efficient extended supply chain processes. Customer or market segment focused retailers need well-trained, well-informed customer-facing sales members on the floor. Product-oriented retailers need exceptional, forward-thinking buying teams, with abilities to spot early trends and consumer interests.

*High employee turnover impacts Human Resources processes perhaps more significantly in retail than in any other major industry segment.*



- **Sporting Goods, Hobby, Book, and Music**
- **Clothing and Clothing Accessories**
- **Furniture and Home Furnishings**
- **Motor Vehicle and Parts Dealers**
- **Electronics and Appliance**
- **General Merchandise**
- **Food and Beverage**
- **Gasoline Stations**

# Transportation

Transportation includes the movement of people and goods from one place to another. The field can be loosely divided into infrastructure, vehicles, and operations, regardless of the mode of transportation.

Infrastructure consists of the fixed installations necessary for transport, and may be roads, railways, airways, waterways, canals and pipelines or terminals such as airports, railway stations, bus stations and seaports.

Operations deal with the way the vehicles are operated, and the procedures set for this purpose including the financing, legalities and policies.

- **Warehousing and Storage**
- **Pipeline Transportation**
- **Water Transportation**
- **Truck Transportation**

- **Air Transportation**
- **Rail Transportation**
- **Postal Service**

- **Transit and Ground Passenger Transportation**
- **Support Activities for Transportation**
- **Couriers and Messengers**



*As alternative forms of energy continue to mature, and if consumer requirements continue demanding “greener” options, the business opportunities availing themselves to traditional transportation organizations require some readjustment.*

# Entertainment and Information



Publishing includes the process of production and dissemination of literature or information. Increasingly enabled by new technology, authors and content developers may become their own publishers.

Publishing phases can be described as content development, content acquisition, copyediting, graphic design, production – printing (and its electronic equivalents), and subsequent marketing and distribution.

New media (the Internet, in particular) has enabled many new forms of interaction and content delivery directly to end-consumers, without the traditional processes.

Combinations of telecommunication, media, and internet provides the consumer information and entertainment through a variety of choices.

*Media/entertainment and information industry segment provides a highly attractive career path for newly minted college graduates. This industry experiences continual change and requires investment to remain competitive..*



- **Motion Picture and Sound Recording Industries**
- **Web Search Portals, Data Processing Services**
- **Traditional Radio/TV Broadcasting**
- **Internet Publishing and Broadcasting**
- **Internet Service Providers**
- **Traditional Publishing**
- **Telecommunications**



# Finance and Insurance

On the whole, financial institutions and insurance organizations provide their customers with access to capital, or conversely protect their capital from losing value through various methods.

A bank aggregates the activities of many borrowers and lenders. A bank accepts deposits from lenders, on which it pays the interest. The bank then lends these deposits to borrowers. Banks allow borrowers and lenders, of different sizes, to coordinate their activity.

Insurance is a form of risk management primarily used to hedge against the risk of a contingent loss. An important aspect of the insurance process is calculation of risk.

*Regulatory considerations and public opinion have required financial and insurance institutions to respond in recent years.. Career paths for knowledge workers and the emerging workforce have placed additional competitive pressure on the industry to recruit and retain talent.*

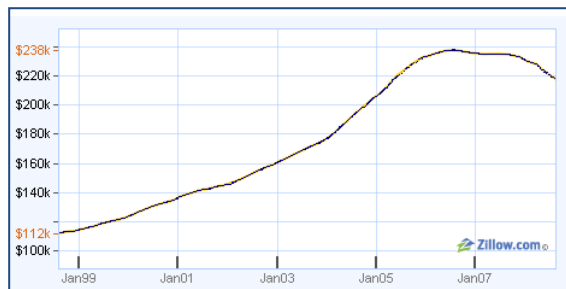


- **Monetary Authorities - Central Bank**
- **Credit Intermediation and Related Activities**
- **Securities, Commodity Contracts**
- **Financial Investments and Related Activities**
- **Insurance Carriers and Related Activities**
- **Funds, Trusts, and Financial Vehicles**

# Real Estate and Property Leasing

Most real estate brokers and sales agents sell residential property. A small number—usually employed in large or specialized firms—sell commercial, industrial, agricultural, or other types of real estate.

Selling or leasing business property requires an understanding of leasing practices, business trends, and the location of the property. Agents who sell or lease industrial properties must know about the region's transportation, utilities, and labor supply. Whatever the type of property, the agent or broker must know how to meet the client's particular requirements.



**US Avg. home Price  
1998-2008**

- Lessors of Nonfinancial Intangible Assets
- Rental and Leasing Services
- Real Estate

*Employment change. Employment of real estate brokers and sales agents is expected to grow 11 percent during the 2006-16 projection decade—about as fast as the average for all occupations.*

# Professional Services

Professional services are infrequent, technical, or unique functions performed by independent contractors or consultants whose occupation is the rendering of such services.

Examples include: accountants, actuaries, appraisers, archaeologists, architects, attorneys, brokerage firms, business consultants, business development managers, engineers, law firms, physicians, performing artists, public relations professionals, recruiters, researchers, and real estate brokers.

*An emerging high-profile service is waste management. This includes the collection, transport, processing, recycling or disposal of waste materials. Waste management is also carried out to recover resources from it. Waste management can involve solid, liquid, gaseous or radioactive substances, with different methods and fields of expertise for each.*

*New professional services are emerging within the alternative energy sector. Waste management organizations in particular have an opportunity to capitalize on their access to feedstock, source organic material – and recycling opportunities..*



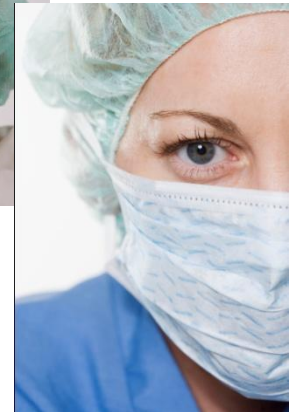
- **Professional, Scientific, and Technical Services**
- **Management of Companies and Enterprises**
- **Administrative and Support Services**
- **Waste Management and Remediation Services**
- **Educational Services**

# Healthcare

Healthcare broadly includes the prevention, treatment, and management of illness, along with the preservation of mental and physical well being through the services offered by the medical, nursing, and allied health professions.

The Healthcare sector includes goods and services designed to promote health, including “preventive, curative and palliative interventions, whether directed to individuals or to populations”. (Definition by World Health Organization Report. "Why do health systems matter?".)

The industry requires professional judgment and skill. The delivery of modern health care depends on an expanding group of trained professionals coming together as an interdisciplinary team



- **Ambulatory Health Care**
- **Nursing and Residential Care**
- **Social Assistance**
- **Hospitals**

*The Human Resources function of all industries may include some emphasis of Healthcare in their respective employee benefits programs.*

*In 2003, health care costs paid to hospitals, physicians, nursing homes, diagnostic laboratories, pharmacies, medical device manufacturers and other components of the health care system, consumed 16.3% of the United States GDP. (According to From Centers for Medicare & Medicaid Services). Specific impacts of recently passed Healthcare Reform Act 2010 remain in-motion.*

# Arts Entertainment and Recreation

Performing arts include the dance, music, opera, theater, and circus arts. Artists participating in these endeavors are frequently in front of an audience – but increasingly are presented through other media channels, including the Internet.

Museums include permanent institutions in the service of society and of its development, open to the public, which acquire, conserve, research, communicate and exhibit tangible and intangible heritage of humanity and its environment.

The gambling segment continues growth in selected regions, while appearing to have peaked in some regions. An increased degree of “social acceptability” has influenced and driven some of the growth..

Together, the Arts Entertainment and Recreation industry segment provide for opportunistic business growth through institutional and entrepreneurial ventures.



- Amusement and Gambling
- Museums, Historical Sites
- Recreation Industries
- Performing Arts
- Spectator Sports

*Job growth in the sector appears uneven, depending on the geographic region, but for those areas expanding, job opportunity and pay tend to be above average than the US as a whole*

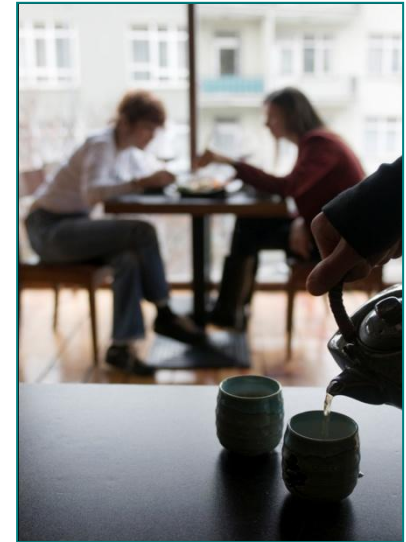
# Hospitality and Food

Hotel and accommodation includes establishments providing paid lodging, usually on a short-term basis. Larger hotels may provide a number of additional guest facilities such as a restaurant, a swimming pool or childcare, and have conference and social function services.

A restaurant is a retail establishment serving prepared food to customers. Service is generally for eating on premises, though the term has been used to describe take-out establishments and food delivery services. The term covers many types of venues and a diversity of styles of cuisine and service.

In both instances, keen attention toward a target market, along with cost control measures to manage the margin provide the basis for successful businesses in this industry segment.

*Brand value is as important in this segment as in consumer product and durable goods sales. While distinctly different from these contrasting industries – that is a ‘service’ rather than a ‘product’ – market reputation, customer expectation, and satisfaction received provide the basis for most business models in this sector.*



- **Accommodation, hotels and motels**
- **Food Services and Drinking Places**

# Public Administration

The public sector is the part of economic and administrative life dealing with delivery of goods and services by and for the government, whether national, regional or local/municipal.

Examples of public sector activity range from delivering social security, administering urban planning and organizing national defenses.

Direct administration groups are funded through taxation; the delivering organization generally has no specific requirement to meet commercial success criteria, and production decisions are determined by government.

Publicly owned corporations differ from direct administration in that they have greater commercial freedoms and are expected to operate according to commercial criteria.

*Emerging attention is being given to the aging workforce within this sector, similar to manufacturing and energy sectors.*



- **Executive, Legislative, Other General Government Support**
- **Administration of Environmental Quality Programs**
- **Administration of Human Resource Programs**
- **Justice, Public Order, and Safety Activities**
- **National Security and International Affairs**
- **Administration of Housing Programs**
- **Administration of Economic Programs**
- **Space Research and Technology**

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