



**STRATEX**

**Customized Projects for Executives**

*Success Without the Stress*

# Who we are

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You know  
what you need  
to achieve.

We can help you  
get it done.

Stratex provides dedicated, experienced professionals to define and accomplish your priority business goals.

We work for business leaders, developing action plans to yield the greatest benefit in the shortest practical timeframe.

We customize project teams based on your specific needs, and work with your management and staff to get what you want done...*done*.

# Areas of Specialization

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**Operations and  
Profitability Improvement**

**Organizational and  
Management Development**

**Sales Strategy and Processes**

**Business Technology Enhancement:  
Systems, Reporting, Controls**

**M&A: Due Diligence through  
Integration Management**

**We'll work with you to:**

- **define goals**
- **evaluate options**
- **keep projects on track**

# What we do for you

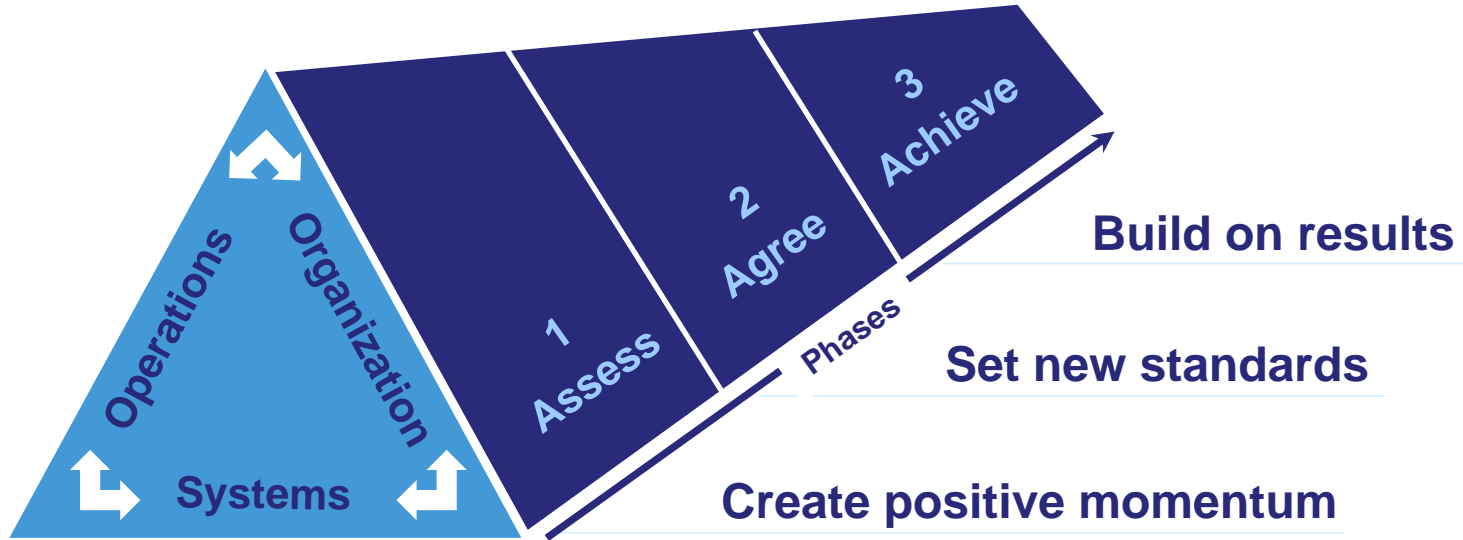
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- Attain financial and operational **performance targets**.
- Streamline operations to increase **productivity and profits**.
- Apply technology to achieve **cost and cycle time reductions**.
- Generate innovative ideas leading to **workable solutions**.
- Improve business analysis with **enhanced reports and metrics**.
- Increase organizational **collaboration and accountability**.
- Provide objective feedback and **effective project management**.

# Phased Impact Approach

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Don't postpone benefits for tomorrow that can be introduced today! Our action-driven approach enables your team to **achieve tangible results quickly and accurately**.



# Phased Impact Benefits

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- Build positive momentum by rewarding ongoing progress.
- Integrate operations, organizational, and systems improvements to amplify bottom-line impact.
- Collaborate among functions and staff levels to motivate innovative and effective solutions.

# Stratex Advantage

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## High-impact Results

Implement cohesive and optimal solutions to reduce costs, expand revenue, improve operations, and strengthen management.

## Unique Strengths

Combine diverse skills and expertise — from strategic acquisitions to technology design to financial processes and controls.

## Proven Track Record

Apply proven success at corporate, entrepreneurial, and public organizations including Morgan Stanley, IBM, American Express and the Federal Reserve.

## Customized Teams

Coordinate one or more senior consultants with your internal resources, creating effective teams to achieve your specific goals.

## Efficient Approach

Yield high returns on time and project investment — we reduce overhead and staffing costs associated with larger firms.

## Senior-level Experience

Draw on knowledge gained from years of working with senior managers, CEOs and Board members.

# Client Success Stories

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## Business Technology Upgrade

Led Intranet application development to improve data integration and analysis capabilities at a premier financial services firm. Reduced processing time by over 85%. Enabled launch of new product lines and expanded client base.

## Integrated Software Outsourcing

Planned and led mission-critical outsourcing for global bank. Reduced annual costs by 45%. Upgraded hardware and software. Launched enterprise portal, sales and workflow applications to integrate operations and client communications nationwide.

## Acquisition and Integration Management

Managed due diligence and integration to enable successful 400% growth through nine acquisitions for the Broadband Division of a global telecom firm. Implemented methods to maximize profits and promote cross-sales.

## Sales and Account Management Improvement

Developed and initiated divisional sales strategy and rollout campaign for a leading global brokerage firm. Improved service quality to High Net Worth clients through revised account management, reporting, and communications. Planned and managed mission-critical software outsourcing.

## Communications Evaluation

Analyzed strategic communications effectiveness for CIO of a Fortune 100 diversified financial services company. Designed interactive survey and analyzed responses to measure preferences, and recommend steps to maximize value of tools and services.

## Productivity Enhancement

Improved training and workflow for a \$140 million direct marketing firm. Established performance metrics, streamlined and automated process, and restructured roles. Increase processing efficiency by 40% and cash flow by 10%, across units.

# Professional Background

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## **Rafael Pabon**

### *Principal*

Rafael Pabon leads projects focused on systems and business strategies. He combines information technology and Internet expertise with extensive experience in sales, marketing, and strategic management to help companies reach higher levels of scale, scope and profitability. Mr. Pabon's background encompasses designing knowledge management systems for Fortune 500 companies and start-ups, integrating legacy and web technology, and building sales and customer support systems for multinational companies.

Mr. Pabon has acted as CIO for a division of Morgan Stanley for three years. In this role he designed and implemented a full-scale technology and operational program to fulfill SEC settlement requirements and completed a major software outsourcing initiative which saved millions of dollars. To execute this directive, he coordinated internal financial, legal, and technology groups with external vendors and regulatory agencies to build required infrastructure and client communications links. As CTO of LoanQuorum, he oversaw the design and development of an international trading system for syndicated loans. Previously, he marketed fixed income products at Barra International, a global financial software and consulting firm, where he ran the New York branch. Prior to that, Mr. Pabon honed his technical and management skills in JP Morgan's Strategic Programs Management Group, IBM's Development and Sales & Marketing divisions and Kodak's Graphics Imaging Systems. Mr. Pabon holds an MBA from Stanford Graduate School of Business, with concentrations in investment analysis and business strategy, and a BSE from Princeton University in Electrical Engineering and Computer Science, where he was the recipient of the Manfred Pyka Memorial Physics Prize. Mr. Pabon has served on the boards of the MIT Enterprise Forum of New York City and the Stanford Business School Alumni Association.

# Professional Background

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## **Stefanie Smith**

*Principal*

Stefanie Smith assists senior managers to define and accomplish priority goals. Her action-driven approach increases profits and productivity by aligning management, operations, and information technology initiatives. She works closely with managers and staff to optimize business processes and achieve measurable improvements from cash flow to sales effectiveness. Her proprietary tool set for managing M&A from due diligence through integration has been used by leading companies to manage smooth and profitable transitions.

Ms. Smith has led an independent practice since 1996, leading initiatives for clients such as Morgan Stanley, American Express, KPMG, Western Forge, WinStar Communications, Grant Associates, Direct Marketing Enterprises, the ASPCA, and the Riverhead Foundation. Previously, as a consultant at Grant Thornton LLP, she advised middle market companies and public sector institutions. Projects included a comprehensive systems evaluation for a retail chain, financial controls improvement for numerous corporations, and a two year operational restructuring of a \$60 million pension fund. At the Federal Reserve Bank of New York and Mount Sinai Medical Center, she led projects to maximize productivity and revenue.

Ms. Smith received a degree in Romance Languages (Spanish, French) from Princeton University and an MBA in Finance and Public Policy Management from The Wharton School, and selected to the International Exchange Program at the London Business School. She has lectured at Columbia Business School and volunteers her expertise to medical, community development, and cultural organizations.

# Professional Backgrounds (continued)

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## **Additional senior professionals who will work with you, based on your needs:**

### **Raquel Rosenfeld – Business Design and Reengineering / Capacity Performance Enhancement**

Identifies, scopes and launches strategic business and operations initiatives. Sourced and managed client relationships as VP at Wit Soundview and as Associate Director at UBS AG. Developed management, trading and marketing tools to enhance treasury, fixed income and swap profitability at Lehman Brothers. Streamlined and stabilized securities operations for Security Pacific Merchant Bank. Spanish, French. [MBA, New York University; BA, Linguistics, Columbia University].

### **Maria Calderon – Sales Expansion / Customer Relationship Programs**

Designs and executes sales expansion plans including customer targeting, development of supporting material, and detailed oversight. Increased customer retention by over 475% for major cable company. Enabled automobile vendor to increase sales 5% in a market which declined 6% in the same time period. Achieved 200% annual growth over the past five years for a medical services provider. [MA International Communications, Boston University; BA Romance Languages, Princeton University].

### **Jane Deuser – Market Strategy & Implementation / Business Development**

Aligns marketing and business plans with corporate goals. Performs market, consumer and competitive analyses to develop integrated marketing communications programs. Developed entry strategy for advertising process technology for Video Networks. Launched customer relationship program for GE Capital. Former Marketing Director at Meridien Hotels. French. [Sloan Fellow, London Business School; BA French, University of Colorado].

### **Adam Weiss – Business Development / Strategic Alliances**

Combines legal and business expertise to implement revenue expansion and business development programs. Experience includes executive management, legal counsel roles and associate positions with SnapNames, McKinsey & Company and Weil, Gotshal & Manges. Spanish, Italian, Portuguese. Admitted in NY, NJ, and Texas. [JD Harvard Law School; BA History, Princeton University].

# Our Value

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**In challenging times, it is more critical than ever to clarify goals, align resources, and keep projects on track.**

- Our results-oriented approach enables you to achieve both strategic objectives and operational targets.
- Your specific needs and preferences determine how we structure the right team from our network of experts.
- From planning to implementation, we'll get what you need done...Done!