



CoreValue
SOFTWARE



Playbook for Success

Jim Lewis, Owner Harvey & Lewis Opticians

For 120 years, Harvey & Lewis Opticians has been providing the greater Hartford, CT area with quality eye care. At any of their nine locations, they provide a full range of eye care services including examinations, contact lens services and the latest in designer eyewear and sunglasses.

Jim Lewis, owner of Harvey & Lewis, wanted to help his company grow from a 'mom-and-pop' company, to a larger, more professionally-managed enterprise so someday he could remove himself from the day-to-day operations. In order to do so, Jim needed a 'playbook' that he and his team could follow - to make the leap and ensure the business would grow and have value well beyond him.

With CoreValue®, Jim had his playbook to create a sustainable and transferable management system, that he and others could successfully implement. "No longer would day-to-day activities sweep important matters under the rug."

After completing the initial CoreValue® assessment, Jim learned

he and his team needed to work on improving sales and marketing processes, tracking and utilizing performance data, and developing and documenting standard operating procedures throughout the company. Jim also learned that much of the value in his company was its talented and eager staff.



Jim and his team along with their advisor then held monthly management meetings to prioritize tasks that would ultimately improve the value of the company. They used CoreValue® to develop a list of 'to do's' each month. These meetings became very important in terms of

instituting structure, discipline, process, and accountability, and were equally valuable in establishing task deadlines and initiating discussions around company priorities.

By using CoreValue®, owner Jim Lewis can now manage and monitor his company against a playbook of 'best practices' for success.

"Scoring all areas of the business and completing related tasks provided me with both practical and psychological rewards. I also love there is one place I can store important documents that substantiate the value of my business. Otherwise, these files would be scattered all over my office and computer. CoreValue® also allows me to think and talk about my business at a level I usually don't get to when stuck in the day-to-day operations. I'm much more conscious of my need to work 'on' the business rather than 'in' the business."