

To the voting members of the Copper Circle:

In response to your request for a deeper knowledge of the Kolbe tools that we use at Boomer Consulting, please accept the following descriptions of how the concept has been integrated both into our team and into our consulting work directly:

Kolbe A™ Index:

- Boomer Team: Jon and I use the Kolbe A results for each of our team members to coach on communication skills and, in some cases, conflict management. It has also been instrumental in building teams within the firm.
- Client Work: The Kolbe A is a staple tool in our Leadership Academy that has over 200 accounting professionals who have either graduated or are in a current program. We are a leader in the profession in coaching and using the tools that Kolbe offers; however, the Kolbe A is a “must have” when we are working with our emerging leader groups.
- Spouses: I have found great success in encouraging our team and our clients to have their spouses take the Kolbe A and allowing us the honor of interpreting the results for the couple. It is fun and usually ends with a couple of “ah hah” moments. VERY rewarding.
- Children: Along the lines of the spouse, our clients have asked us to interpret the Kolbe A™ or Y™ Indexes for their children. I have worked primarily with high schoolers preparing for college or client’s college-age young adults. Again, extremely rewarding and always valuable.

RightFit:

- Boomer Team: We simply will not hire without completing the RightFit process on any team member. This includes not only the full time team members, but also the contract labor. We have only made a big mistake when we ignored what the tool was telling us. A mistake we will not make again!
- Client Work: We coach CPA Firms that we work with to follow the same rules of engagement that we have – use the Kolbe RightFit in every hiring. Those that listen are delighted. Read the testimonial by Horne CPA group for a great story.

Kolbe Comparisons™:A to A:

- Boomer Team: We rolled out the Kolbe Comparisons™: A to A for all of our team members and to be honest, it took a little while for them to “get it”. However, when one of the other owners (Jim Boomer) and I were struggling in getting a project off the ground, I suggested we take a look at this report to see if we were missing the mark in how we were working as a team. We sat down, talked through it, make some strategic decisions on how we would run the project, as well as who we would add to ensure success. It was the key to our launch across the firm. We told the story and everyone is using the reports and the amazing information now.
- Client Work: The best tool we have used in years is the Kolbe A to A. Recently I worked with Clark Nuber’s Executive team and ran a Kolbe A to A for everyone involved. We went through each of the reports and talked about how they could use the information to strengthen relationships and increase

their trust. All agreed that it was fantastic information and they agreed to roll out Kolbe A's, A to A reports and Synergy reports for their entire firm (200 People).

Synergy Report:

- **Boomer Team:** This is another tool that is a staple for Boomer. We do not build a team for a task force or for a client engagement without running and analyzing the Synergy Report. Everyone gets this!
- **Client Work:** When I coach firms in teambuilding and we talk about how they put a group together for a project, the synergy report is what I reach for. All of our clients know what this is and they love it. Another consulting staple.

Commitment Clarifier®:

- **Boomer Team:** We complete quarterly game plans with every team member. There are times when someone simply has too much on their plate, and coaching them through the commitment clarifier is a life saver. I would also say that for me personally, it has been an exceptionally valuable tool as I have moved from Consultant to President of the company, and I have had to shift my personal commitments.
- **Client Work:** In our profession, mergers and acquisitions are top of mind for all CPA firms today. Since that is our entire client base, the commitment clarifier is essential as we help them identify where they will make commitments and what opportunities they want to focus on. This is also a great tool when I am doing personal coaching for an individual in the firm. It helps us have a productive conversation and set goals in a very creative and positive way.

Dynamynd®:

- **Client Work:** We speak at industry conferences throughout the US and Canada approximately 20 times a year. In many of these conferences I am asked to talk about culture, individual engagement, retention and recruitment. In many of those presentations I show the Dynamynd (I choose one or a variety dependent on the audience and topic). It is always one of the slides that creates conversation and also leads to strong conversations after the close.

Boomer and Client Awesome Outcomes:

- **Horne CPA:** Identified an internal individual who would have likely left the organization if we had not completed the Kolbe process with them. He was an internal candidate that they had written off as not detailed enough; however, after completing the process, they determined that he had the natural ability to do the job to their expectations. He is a leading CIO today in the accounting profession.
- **Clark Nuber:** This firm has a turnover rate of 8% compared to our industry average of 25%. Their HR Director attributes that great success in part to their use of RightFit.
- **Hartman Blackmon & Kilgore:** The firm had an emerging leader who was ready to leave the firm due to an inability to communicate with the partners. In her mind, she felt they did not value her or her knowledge. We used the Kolbe A to A and the Commitment Clarifier to coach her, along with the partners. Today, she is back on track. In our profession, with turnover in the mid-management level at an all-time high, the firm felt this was one of their biggest success stories in years.

- Boldt Carlisle and Smith: This firm had a partner who was not engaged and failing fast. The firm believed the only way to deal with him was termination. I asked if we could use the Kolbe A, B and C to identify where some misalignment might be, and they agreed. After the consulting work, we found that indeed he was just spending much of his time in the wrong activities. We realigned his position, created alignment and today, he is a rainmaker partner – happy and extremely valuable to the firm.

Kolbe is a part of our culture now, and it is also a part of the culture for many of our clients. We have certainly “drank the Kolbe Kool-aid” and made it a strong part of our culture, both internally and with our client base.

Regards,

Sandra Wiley

President, Boomer Consulting, Inc.



Boomer Consulting's submission for the Kolbe Professional Award

Sandra Wiley - President

Jon Hubbard - Director of Business Development/ Consultant

Some of our past awards:

2012-2014 CPA Practice Advisor *Top 25 Thought Leader*

2009-2015 Accounting Today *Top 100 Most Influential*

2012-2015 CPA Practice Advisor *Top 25 Most Powerful Women in Accounting*

2012 Leading Edge Alliance On the Edge *Innovation Award*

Horne CPA - Is a CPA Firm in Jackson Mississippi. They are an accounting and advisory firm. They are a firm that has always put technology in the forefront of their firm and at one time in their history they knew they needed to hire a Chief Information Officer. They had an internal candidate but felt they would have to go outside to find the right person. I spoke to them about Rightfit and they choose to follow the process. They looked at one internal candidate and 2 external candidates and the Kolbe A of the internal candidate was a perfect fit was the internal candidate. They were surprised, but also thrilled that they found such a great fit with their expectations. Dave is still with the firm and is known among his peers as being a leader in technology foresight.

Dave Bufkin, CIO, Horne LLP

"I have had the privilege of working with Boomer Consulting and Sandra Wiley for the past 10 + years. Sandra brings both professionalism and a personal touch to each of her engagements Her expertise and knowledge of the Kolbe A Index has been a tremendous asset in evaluating potential key team members and finding the right person to join our team. My own hiring experience is a testimony to Sandra's skillset. Her ability to interpret the Index of both myself and the executive suite provided insight demonstrating my cognitive strengths aligned with the culture of the firm. Horne is proud to partner with Sandra and Boomer in building the team that will lead the firm of the future."

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Clark Nuber CPA - Clark Nuber is a firm in Bellevue Washington. They are an accounting firm that is in the Top 200 in the country and is known for their innovative practices. Tracy is the Director of HR and we have led them through the Kolbe process using Kolbe A and B for many years. We have worked with many of their teams - Technology, HR, Tax and Audit - to help them with team building and communication. In all cases, we have been asked to assist as they hire new people, and educate all new people on Kolbe language and communication methods. They have also used Kolbe Rightfit for many of their hiring decisions.

Tracy White, Senior Director of Human Resources, Clark Nuber

June 29, 2016

RE: Sandra Wiley Reference Request

To Whom It May Concern:

Throughout the course of our lives we come in contact with a number of different types of people. I was fortunate enough to have met a woman who has a very positive effect on the people she comes in contact. That woman is Sandra Wiley.

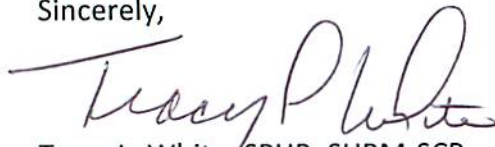
I have utilized Sandra's talents a number of times. The first was in my earlier years of my current employer, Clark Nuber. Sandra gave a presentation at a conference I was attending and I had the opportunity to learn first-hand about Kolbe. Immediately I wanted to try it with my team and Sandra walked me through the process. Now we use the tool for hiring all of our administrative staff and as a team building tool within our administrative departments.

We have looked and even tried other assessment tools but none of them have delivered the same level of value. And I thank Sandra for continuing to support our needs, addressing our concerns and providing on-going training to our teams. Not just with Kolbe but other educational programs for our employees.

Sandra conducts herself with the utmost professionalism and is very well liked and respected by all who have the pleasure of learning and working with her. This is evident on her session evaluations, by the participants comments made to me personally. Sandra is dedicated to doing an excellent job and she has done this in all her educating and educational work. She approaches everything with enthusiasm and creative thinking. Sandra is a joy to work with.

I can easily give my highest recommendation for Sandra Wiley. She is a woman with a purpose; a purpose that should be carried out.

Sincerely,



Tracy L. White/SPHR, SHRM-SCP
Senior Director of Human Resources

TLW:ms



T: 425-454-4919
T: 800-504-8747
F: 425-454-4620

10900 NE 4th St
Suite 1700
Bellevue WA
98004

clarknuber.com



Baldwin CPAs

Baldwin is experienced and qualified to provide accounting services to a wide variety of businesses and industries. The firm has concentrations in the industries of construction contractors, financial institutions, governmental, not for profit and nursing homes. Baldwin is a member of the Private Companies Practices Section of the American Institute of Certified Public Accountants and the AICPA's Governmental Audit Quality Center and Employee Benefit Plan Audit Quality Center.

Description of results - I work with Baldwin every year on Kolbe. They are a fast growing firm and acquiring new offices regularly. It's imperative that their entire organization understands and utilizes Kolbe to improve communication, teamwork and roles.

G. Alan Long, CPA, CITP, CGMA – Managing Member, Baldwin CPAs

“I have had the pleasure of working with Jon Hubbard on multiple projects. Jon has always done a great job with our firm on the items we have worked together on. He is always professional and truly wants to help our firm. His grasp of Kolbe has been very beneficial to our folks with understanding the scores and helping us to better communicate within our teams.

Jon has a pleasant and patient communication style that has resonated well with our staff. I have no problem recommending Jon to work with anyone.”

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Hartmann, Blackmon & Kilgore

Hartmann, Blackmon & Kilgore P.C. is a certified public accounting and business consulting firm serving a diverse group of clients ranging from small businesses and individuals to governments and multi-national corporations. We maintain four offices throughout Baldwin and Escambia counties in Alabama to serve the needs of clients along the Gulf Coast and across the nation.

Description of results - As part of a larger "internal client service" initiative. I incorporated Kolbe as the foundational element of strong internal relationships. Team members have more respect for one another now that they understand one another's Kolbes. Partners are better able to communicate with staff and staff is better able to communicate with Partners.

Dennis E. Sherrin, CPA CVA CFF CGMA, Managing Shareholder, Hartmann, Blackmon & Kilgore, P. C.

“Hartmann Blackmon & Kilgore has worked with Jon Hubbard for the past 6 years on a variety of projects. Jon provided Kolbe consulting services to new hires and provided me a resource to discuss Kolbe application in our professional practice. In the past year, Jon was the source to assist our firm on the implementation of a major internal service initiative to improve teams and operational effectiveness. As part of the process, Kolbe A training was utilized providing employees greater understanding of how we can work better as teams and enhance our understanding of how one another instinctively acts when striving to do things at work. The implementation of the internal service initiative is a continuing success thanks in large part to Jon’s guidance. On a personal note, through encouragement from Jon, I have obtained certification as a Kolbe Specialist. Jon’s enthusiasm for Kolbe was influential in this decision.”