

# RallyPoint Advisors

## CAPABILITIES GUIDE

*We deliver value through consulting, contracting, and logistics excellence.*

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RallyPoint Advisors is a certified Service-Disabled Veteran-Owned Small Business (SDVOSB) providing strategic consulting and operational support to help organizations grow, improve efficiency, and scale with confidence.

Inspired by the military concept of a “rally point,” the firm brings disciplined execution, data-driven decision-making, and measurable results to every engagement. RallyPoint Advisors supports clients across the business lifecycle through strategic planning, business development, proposal writing, financial modeling, organizational development, executive coaching, and contract/program management.

Core capabilities include compliance support, SOP and policy development, workflow optimization, cost-reduction initiatives, logistics and supply chain management, procurement, facility operations, and AI-driven solutions such as predictive analytics and intelligent automation.

### Differentiators

- **Veteran Expertise:** 100% veteran-owned, with leadership experience in complex, mission-critical operations.
- **Integrated Solutions:** Comprehensive consulting spanning strategic planning, contract readiness, operations, logistics, and AI innovation.
- **Mission-Driven:** Commitment to measurable outcomes that improve performance, reduce costs, and drive growth.
- **Vendor-Neutral:** No software commissions or referral agreements. We recommend what fits you.
- **Fixed-Scope Pricing:** You know the investment before we start. Change orders only if scope changes.

### Certifications & Registration

<b>Certification</b>	Service-Disabled Veteran-Owned Small Business (SDVOSB)
<b>Cage Code</b>	13W21
<b>DSBS</b>	Full NAICS code list available in DSBS

## NAICS Codes

- 541611 — Administrative Management and General Management Consulting Services
- 541614 — Process, Physical Distribution, and Logistics Consulting Services
- 541612 — Human Resources Consulting Services
- 611430 — Professional and Management Development Training
- 541618 — Other Management Consulting Services
- 541513 — Computer Facilities Management Services
- 541990 — All Other Professional, Scientific, and Technical Services
- 488510 — Freight Transportation Arrangement
- 488320 — Marine Cargo Handling
- 488991 — Packing and Crating
- 488119 — Other Airport Operations

## Core Competencies

Small Business Strategy & Development	Compliance Management
Business planning, market positioning, proposal/grant writing, budgeting, leadership training, executive coaching, and contract/program management.	Regulatory alignment, SOP development, operational audits, workflow optimization, cost-reduction, strategic partnerships, and workshop facilitation.
Logistics & Operational Support	Leadership & Execution Oversight
Supply chain management, procurement, vendor coordination, inventory tracking, facility operations, and full-scope event/project logistics.	Executive management, financial planning, HR, stakeholder engagement, marketing/communications strategy, and AI-driven solutions.

## 1. Finance & Operations — Fractional CFO

Most SMBs outgrow their financial processes before they outgrow their ambitions. They have messy cash flow, no forecasting, and no budget for a full-time CFO. We step in as the operational finance partner that gives them clarity to grow.

### What we deliver

- Cash flow forecasting model built for your business
- Monthly financial close support and variance analysis
- Budget vs. actuals reporting and KPI dashboards
- Revenue and margin analysis by product, service, or customer
- Banking and lender relationship preparation
- Board and owner reporting packages
- Financial modeling for proposals, grants, and government contracts

## Common problems we solve

- "I don't know if I have enough cash to make payroll next month"
- "My accountant gives me tax returns but I have no idea how the business is actually performing"
- "I'm growing but somehow less profitable"
- "My bank is asking for financial projections and I have nothing to show them"

## 2. ERP / Systems Implementation

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When a business outgrows QuickBooks and spreadsheets, the transition to an ERP system is disruptive without the right guide. We bridge the gap between finance knowledge and technology — so the implementation actually sticks.

### What we deliver

- Current-state process mapping and gap analysis
- ERP selection support (vendor-neutral recommendation)
- System configuration, chart of accounts, and workflow design
- Data migration — historical records, open items, vendor and customer lists
- Integration with payroll, banking, e-commerce, or other tools
- User training for up to [X] team members
- Go-live support and 30-day post-launch stabilization
- SOPs, admin runbook, and user documentation

### Common problems we solve

- "Our books are a mess because we have data in three different systems that don't talk to each other"
- "We chose a system two years ago but never fully implemented it"
- "Our inventory is always wrong and we don't know why"

## 3. AI & Automation Implementation

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Most SMBs have staff spending hours each week on work that AI tools can handle in minutes — invoice processing, reporting, customer communications, data entry. We identify those opportunities and implement practical, no-hype automation that saves time and reduces cost. This aligns with our AI-driven solutions practice including predictive analytics and intelligent automation.

### What we deliver

- Automation opportunity audit — ranked by time saved and implementation ease
- AI tool selection and vendor evaluation (ChatGPT, Claude, Zapier, Make, and others)
- Workflow automation buildout: invoicing, reporting, email triage, data entry
- Predictive analytics configuration for demand planning and financial forecasting
- Integration between existing tools — accounting, CRM, e-commerce
- Staff training on new AI-assisted workflows
- ROI measurement: hours saved, error rate reduction, cost per task

## Common problems we solve

- "My team is drowning in manual work but I can't justify another hire"
- "I keep hearing about AI but have no idea what's actually useful for a business like mine"
- "We're spending hours every week pulling reports that should be automatic"

## 4. HR & People Operations

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Companies between 10 and 100 employees hit an HR wall — no systems, no onboarding process, no compensation structure. Without the right infrastructure, growth creates chaos. We build the people operations backbone so your team can scale cleanly. This service aligns with NAICS 541612 (Human Resources Consulting Services).

### What we deliver

- HR systems audit: current tools, processes, and compliance gaps
- HRIS selection and implementation (Gusto, Rippling, BambooHR, and others)
- Employee onboarding and offboarding process design
- Job architecture: role definitions, levels, and comp bands
- Performance review process and cadence design
- Employee handbook and core policy documentation
- Compliance review: I-9, offer letters, classification, leave policies
- Human capital management strategy and succession planning

### Common problems we solve

- "We hired 15 people this year and there's no consistent onboarding — everyone learns differently"
- "We're paying similar roles differently and it's creating resentment"
- "I know we have compliance gaps but I don't know where to start"

## 5. Supply Chain & Procurement

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Product-based SMBs are still recovering from supply chain disruptions — inconsistent lead times, over-reliance on single vendors, and margin erosion from procurement inefficiencies. This service draws on our NAICS 541614 (Logistics Consulting) expertise and covers freight coordination, vendor management, and full-scope operational logistics.

### What we deliver

- End-to-end supply chain mapping and risk assessment
- Vendor scorecard development and supplier rationalization
- Procurement cost analysis — identifying savings and overpayment
  
- Lead time and safety stock optimization
- Dual-sourcing strategy for critical components or SKUs
- Procurement policy and PO approval workflow design
- Inventory management system review and optimization

- Freight transportation arrangement and carrier coordination (NAICS 488510)
- Marine cargo, packing/crating, and airport operations support (NAICS 488320, 488991, 488119)

### **Common problems we solve**

- "We have one supplier for our most important product and they've let us down twice this year"
- "We're carrying too much of the wrong inventory and not enough of what sells"
- "Our procurement is ad hoc — different people buying from different vendors at different prices"

## **7. Sales Process & CRM Implementation**

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Many SMBs grow to a certain point on relationships and referrals — then stall because there is no repeatable sales process. Deals fall through the cracks, follow-up is inconsistent, and no one knows what's actually in the pipeline. We build the system that turns a talented sales team into a predictable revenue engine.

### **What we deliver**

- Sales process audit: current state, conversion rates, and bottlenecks
- Sales playbook: stages, activities, and exit criteria for each pipeline phase
- CRM selection and implementation (HubSpot, Salesforce, Pipedrive, and others)
- Pipeline design, deal stages, and reporting dashboard configuration
- Lead routing, follow-up automation, and task assignment workflows
- Sales team training on process and CRM usage
- Win/loss analysis framework and forecast accuracy improvement

### **Common problems we solve**

- "I have no idea what's actually in our pipeline or when deals are going to close"
- "We lose deals because no one followed up — it fell through the cracks"
- "Our best salesperson is leaving and all their contacts are in their phone"

## **How We Work**

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## Our engagement model

Every engagement follows a consistent four-step framework, regardless of service line:

<b>1. Discover</b>	We start with a no-cost 60-minute diagnostic to understand your situation, goals, and pain points before we propose anything.
<b>2. Design</b>	We present a fixed-scope proposal with clear deliverables, timeline, and pricing. No billable-hour surprises.
<b>3. Deliver</b>	We execute with weekly check-ins and milestone sign-offs. You always know where the project stands.
<b>4. Document</b>	Every engagement ends with documentation — SOPs, playbooks, dashboards, or reports — so the work lives beyond us.

## Let's Talk

The best first step is a 60-minute diagnostic call — no cost, no obligation. We'll ask about your business, listen carefully, and tell you honestly whether we're the right fit. For government and contracting inquiries, please reference our Cage Code and UEI in your outreach.

**Book a diagnostic:** [rallypointadvisors.com](http://rallypointadvisors.com)

**Call or text:** 813-944-9444

**Email:** [phil@rallypointadvisors.com](mailto:phil@rallypointadvisors.com)

**Website:** [rallypointadvisors.com](http://rallypointadvisors.com)

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