



CREATING GREAT PLACES TO WORK

SJ Advisors 2014 Stakeholder Survey

Knowledgeable Thorough
Professional



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Background

- SJ Advisors (SJA) is currently in its fourth year of operation as independent municipal advisors. They contacted Employee Strategies to assist with their growth plans in preparation for their upcoming five year milestone.
- During the initial phase, Employee Strategies conducted a Stakeholder Survey to gain insight from clients and other stakeholders to
 - Pinpoint unique and valued aspects of service and style
 - Understand what differentiates SJA from competitors
 - Identify additional potential service offerings
 - Discover opportunities for improvement
 - Additionally, the survey would help SJA clarify its core values
- An invitation to participate in the survey was sent to all clients for whom SJA has completed a transaction since October 2010 as well as a selection of other clients and professionals who have worked with Steve over time.
 - The survey response rate was 29%.
 - 73% of responses were from clients, 27% from other stakeholders.
 - The survey was open for several weeks between March and April 2014.
- Thanks to all those who took the time to participate. Understanding what you value will be very helpful as SJ Advisors prepares its fifth year in business and subsequent five-year plan.



Why have you chosen to work with SJ Advisors?

Themes from responses

Referred

- Word of mouth is important
- Good reputation

- “Steve was highly recommended by a colleague.”
- “They were referred to me by the CFO of one of our Universities.”
- “Initially because of the cost, but also a recommendation”

Knowledge

- Consensus that SJ is expert
- Experience is known

- “Specific knowledge in the industry and ability to strategically work with clients.”
- “Advice and strategic planning on building acquisition.”
- “Experience”

Integrity

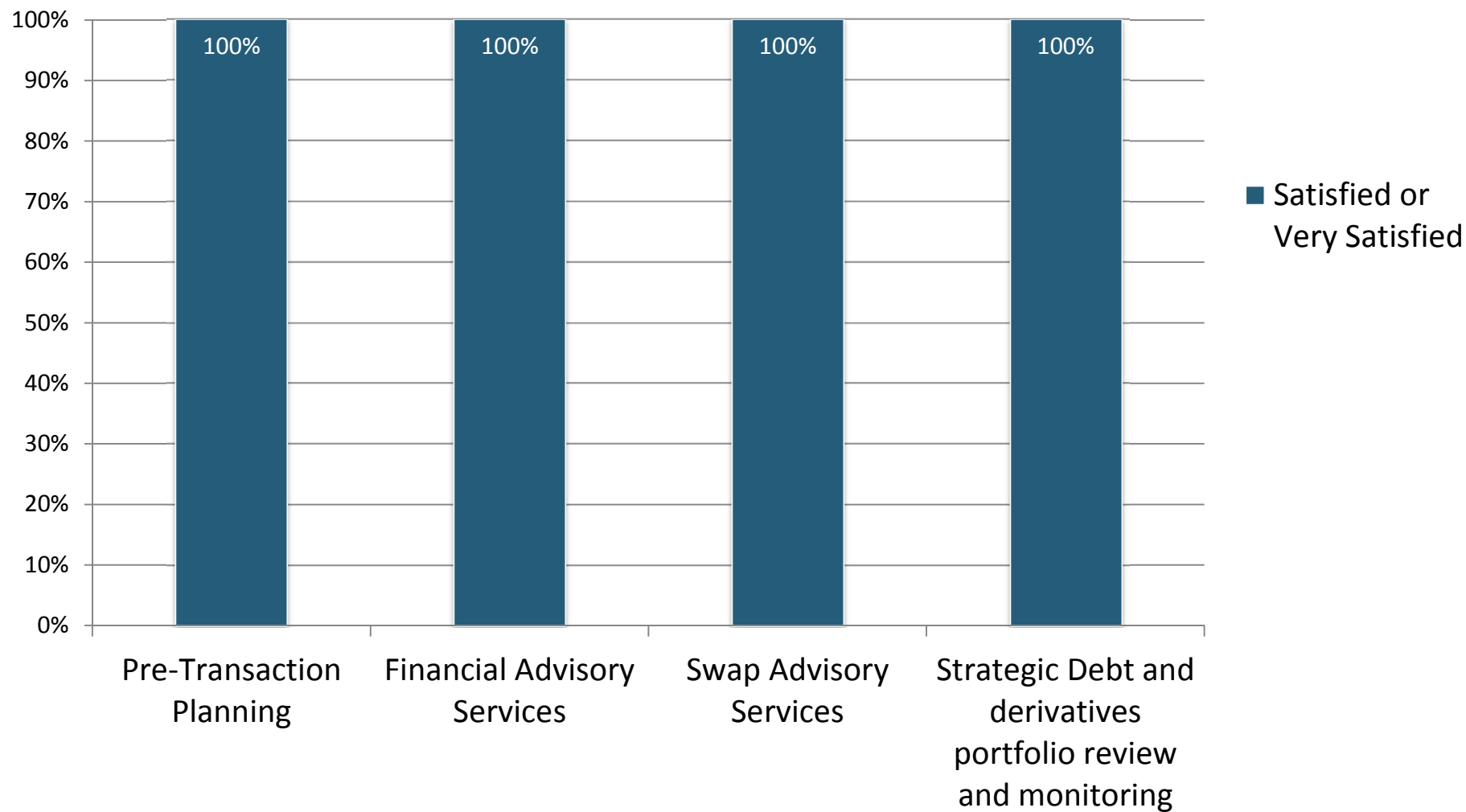
- Quality work is demonstrated
- Trust has been created

- “Quality and integrity.”
- “Personal knowledge of Steve's integrity and quality of his work”
- “Experience and Polish and Communication style”



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Where you have direct experience, please indicate how satisfied you are with SJ Advisors service offerings:





What is SJ Advisors best at?





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What is SJ Advisors best at?

Analysis and presentation

The entire bond transaction preparation process was completed with excellence

Smart finance, excellent consultation skills, availability, networking resources

Bond Market Knowledge and Bond structuring

Educating the client and working through the transaction without losing patience

Keeping the process moving, advising the best course

Their customer service is the best. They go out of their way to do the best work possible.

Client service

Understanding the business perspective and bringing clarity to very complex transactions

Tax exempt bond financing advisory services



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What 3 words would you use to describe SJ Advisors?

Knowledgeable, responsive, thorough

Bright, accessible, helpful

Knowledgeable, professional, polished

Knowledgeable, patient and understanding

Helpful, friendly, knowledgeable

Knowledgeable, dedicated, caring

Integrity, honesty, service

Knowledgeable, thorough, professional

Knowledgeable, trustworthy, competent



What is it like to work with SJ Advisors compared to other external providers?

Themes from responses

Positive

- Steve is easy to work with
- Brings a positive attitude

- “There is a consensus in my facility that working with Steve has been an extremely positive experience.”
- “Steve is easy to work with; he has a relaxed manner.”
- “It is very welcoming; stress free.”

Responsive

- Follow through is felt
- Personal interest/attention

- “Great, very responsive and proactive”
- “It is the personal touch that SJ Advisors adds that separates them from other providers.”
- “Steve was great to work with, kept the process moving . We couldn't have done it without him.”

Walks the Extra Mile

- Goes above and beyond

- “They go above and beyond what they are asked to do.”
- “SJ Advisors is more personal, more client focused and independent”
- “We regularly keep in touch after the work is done.”
- “First rate”



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Questions regarding improvement and growth

What is the single biggest improvement SJ Advisors could make?

None

None that I can think of

Develop brand

N/A

What is the most important thing SJ Advisors needs to do to be positioned for future growth and success?

Don't know

Marketing

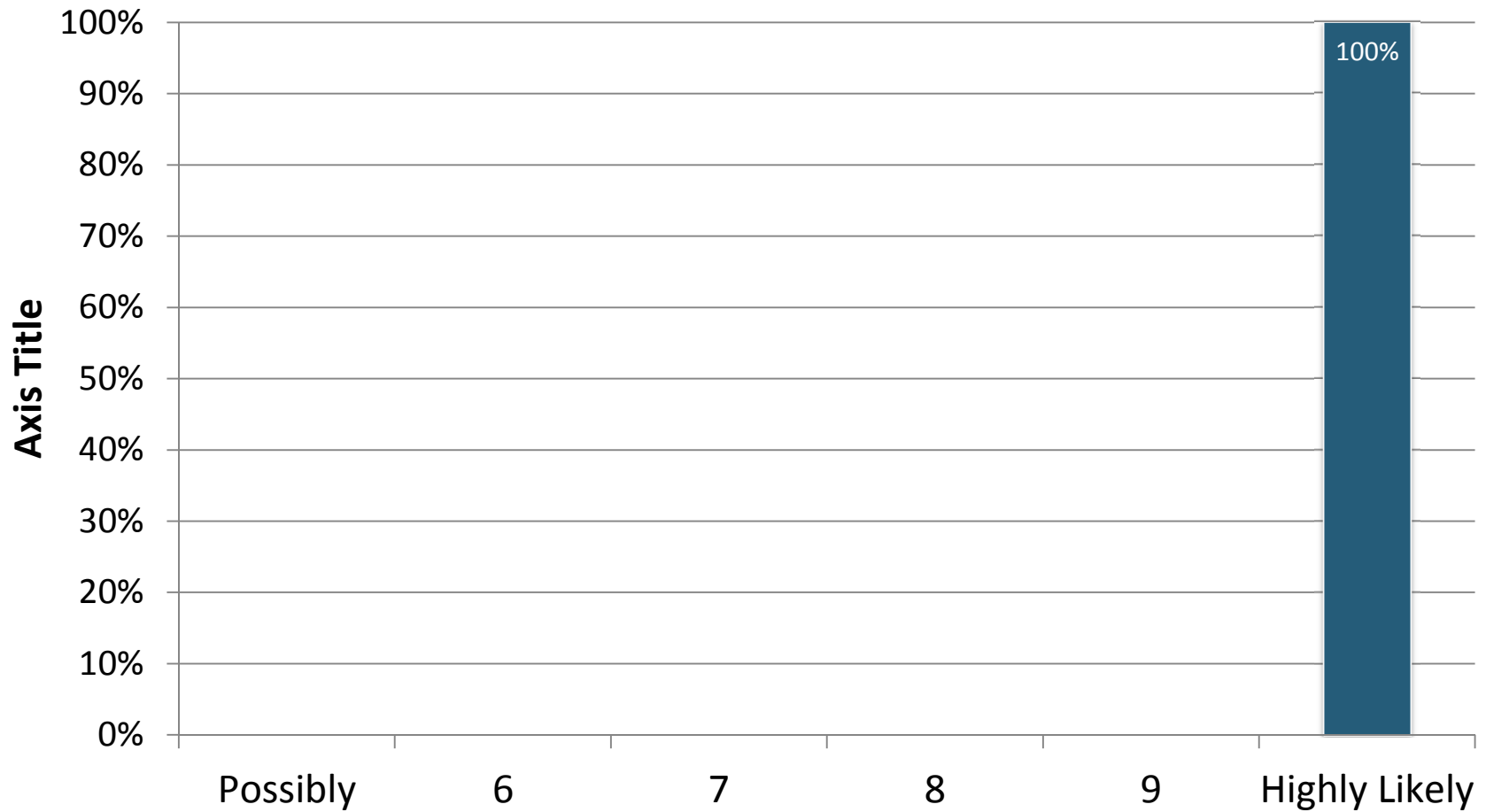
Maintain independence and continue to offer integrity and personal service.

Keep doing what they are doing

Continue marketing efforts



If given the opportunity, how likely are you to refer SJ Advisors to a friend or colleague? *(Scale of 1=low to 10=high)*





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ES EMPLOYEE STRATEGIES

Creating great places to work.