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**JAMES GIBBONS**

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**SUMMARY & PROFILE**

I am a highly self-motivated individual with a history of strong prospecting and sales skills. A successful business owner with over 35 years' experience in helping private and corporate clients with their investment needs. I am very aware of business principals and the key drivers for growth.

My first business, Parkgate Financial Solutions, was formed in March 1996 and I was a co-owner and partner. The ambition was to grow the company through offering advice in the investment and retirement arena. This was both to individuals and SMEs. From that time, through to 2009, the business built up to four branch offices servicing around 3000 clients with a team of 16 support staff. Funds under advice was in the region of £65million. I was responsible for the management of the staff and the sales consultants in addition to delivering revenue from my own high networth clients. I facilitated my own MBO/sale in 2012 and the business was subsequently acquired by an international insurance company, SANLAM.

My new company, Strategic Growth Solutions Ltd, was set up in 2014. We're a coaching, mentoring and management development consultancy offering objective, professional support intervention and non-executive services to help a business succeed. Our range of support services includes Change Management, Strategy & Organisational Planning, Succession Planning and Business Development.

My company possesses a wealth of experience, knowledge and history of business success in delivering specialist consultancy support to ambitious SMEs. I have supported companies in directing strategy towards the profitable growth and operation of the business whilst developing strategic operating plans that add value and reflect the longer-term objectives and priorities established by the board and senior personnel. I have delivered projects in the food, chemical, manufacturing, professional services, media, digital, creative, transport and logistics sectors.

I support companies in being tactical with sales plans, profit targets and developing relationships with clients. My support also extends to helping senior managers in creating the right vision in identifying and reporting on business opportunities through effective sales channels in target markets whilst maximizing new business development openings and overseeing sales teams. This can often have a positive outcome in de-risking the business by creating more balance with the revenue stream across the customer base.

From a leadership and management perspective, I have given support to senior and middle management helping them with the transformation from individual contributor to manager/leader. I have supported individuals in developing a leadership and management style coupled with a leadership strategy for managing high performance and developing people and their skill set.

Bringing the above into some form of value framework, there have been significant improvements in the turnover and profitability with the companies I have worked with. Managers are now more accountable and able to convey expectations to teams and individuals with more clarity and purpose. Time is now spent on defining the goals and setting milestones for achievement. Senior personnel are now more in control of vigorous management of the outputs and attention to leading the team from the front to embrace the planned changes and manage/sustain that change so not to fall back into old ways.

I also put in place a series of evaluation processes. This creates discipline for regular measurement of my proposed support with predetermined review sessions. Individuals are committed to actions to embed the practical delivery of the support and evaluation/feedback sessions are conducted.

My professional style and delivery of the support to a business is a blend of consultancy and coaching dealing with things sensibly and realistically in a way that is focused on practical intervention whilst giving some consideration to the theory. From a consultancy position, in most cases, business consultants will map out what obstacles and barriers are holding a business back, charge them for it and leave it at that. I am different. I get my sleeves rolled up and get stuck in. This is in the context of where I am able to identify areas that need changing, that if not executed, can be commercially damaging to the business. My approach is open and honest.

It's not good enough to just identify the core areas of a business' obstacles or what the strategy for a business should be. It's critical that it is executed and rolled out. I work strategically at senior management and board level and this involves developing the individuals/team skill set to deliver the best possible results for growth but to eliminate commercial damage.

To some extent, this can bring coaching and mentoring into the support delivery. I am a member of the **Institute of Leadership & Management (ILM) and hold a Masters level qualification in Executive Coaching and Leadership.** Using my transferable knowledge and skills has been proven to date with the companies I have worked with and the return on their investment in my company and what I deliver.

I am not a sector specific professional - I am a business specific professional and given this, there are common values that apply to any business regardless of sector. For example, strategy, organisational structure, communication and openness.

## KEY SKILLS

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- Prospecting, market awareness and identifying opportunities
- Sales, building rapport with clients and delivery of product
- Process, understanding and implementing discipline and design support
- Client relationships, building trust and understanding customer needs
- Leadership & Management, ability to bring out one's natural strengths and defuse board room misalignment
- Strategy Planning, creating vision and setting of goals
- Listening and understanding business barriers to growth
- Very high level of understanding of the professional services sector

## ACHEIVEMENTS

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- Growing a business from start up to sustained profitability and acquisition
- Generating 15 jobs throughout my business career
- Increasing turnover year on year by 30%.
- Generating over 90 companies into the Growth Accelerator Program over a 15-month period as a growth manager with Winning Pitch
- Producing positive outcomes to the SME community from the support on offer through Growth Accelerator.
- Introducing 13 companies to the Growth Accelerator service as a coach over a 15-month period

## PROFESSIONAL EXPERIENCE

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### Managing Director Strategic Growth Solutions Ltd, Lymm, Cheshire

May 2014 – Present

Since the company launch, I have become an approved Growth Accelerator Coach and Leadership & Management Trainer.

I can help in identifying the skill and leadership gaps with senior management and your workforce, delivering strategies to improve your process, sales and marketing and other key drivers that will help you achieve your growth ambitions.

Strategic Growth Solutions has been built on a wealth of business experience, knowledge and history of business success. I can assist in developing strategies to produce positive outcomes from experienced coaching intervention into all aspects of your business and your people.

I also have transferable skills and knowledge in the Professional Services sector, for example, IFA/Financial Advisors, Solicitors and Accountants. I also have a strong knowledge of acquisition and exit planning in the professional services sector given my previous career history and my own company sale.

Since Strategic Growth Solutions was set up, I have been engaged in food, chemical manufacturing, professional services as well as Media and Digital Creative sectors. I have more recently been engaged with the transport and office logistics sectors providing succession planning and assisting in the process of management buy outs, MBO from a succession perspective. Of the 13 firms that I have helped create strategic change and developed in my first year, I am still working with eight of these who require supporting with leadership and management support.

### **Winning Pitch Manchester Growth Accelerator Growth Manager**

Jan 2013-April 2014

A specialist management consultancy providing executive coaching and leadership support to high growth businesses. Winning Pitch is a lead contractor on the Growth Accelerator programme, a £200 million Government backed service focused on developing the next generation of high growth businesses.

- Selling bespoke solutions to enable high growth potential businesses reach their full potential. Specific activities include:
- Understanding the growth needs of a company
- Co-developing a support package with a company enabling them to overcome key growth barriers
- Selecting & introducing the most appropriate expert coach to deliver this work package
- Monitoring service delivery to ensure quality
- Enabling clients to maximize the benefits Growth Accelerator offers
- Ensuring connectivity for businesses - bringing in other relevant expertise where required
- Identifying follow on work necessary to assist in the continued growth of the company
- Consistently exceeding customer acquisition targets of 10 sales per month.
- Delivering several customer acquisition and promotional events per month.
- Successful generation of strong intermediary network to support customer lead generation and acquisition activity

### **Parkgate Financial Solutions LLP Partner**

March 1996 - July 2012

Parkgate Financial Solutions was formed in March 1996. The ambition was to grow the company through offering advice in the investment and retirement arena. This was both to individuals and SMEs. From that time, through to 2009, the business built up to four North West Branch offices servicing around 3000 individual clients with a team of nine consultants plus seven sales and administration support staff. We were awarded the contract to supply financial advice to the Merseyside Police force as well as running, presenting and organising the three-day seminar event four times a year.

The company came under my sole control as Principal in May 2009 following a partnership change. This then enabled me to re-launch the business and implement the changes and developments to fit with the financial services changing landscape. I had a three to five year plan to restructure the company ready for the changes to regulation that were on the horizon. A complete revised strategy was implemented that involved complete re-structure of the sales culture with the emphasis on recurrence of income and Fee Based Advice. It was necessary to embark on a journey of change management and recognise quality leaders within the business to take it forward with the correct disciplines and create robust HR controls.

### **Abbey National Independent Financial Advisers, (ANIFA) Sales Consultant**

1991-1996

Working as an IFA in the North West of England building a portfolio of investment clients from an orphan historical client bank and also generating new clients through professional third party alliance partnerships, Solicitors and Accountants. This enabled me to cut my teeth on the independent advice landscape and build a greater understanding of the wider range of investment products. It also brought a new dynamic in that I was working on a client's behalf rather than an insurance companies.

### **Prudential Assurance Company Ltd (PACL) Insurance Agent, Warrington North**

1976-1991

In my time with Prudential, I managed various agencies in the north of Warrington for around 15 years. My role was to collect industrial branch premiums from customers on my territory, generate new business in both Industrial and Ordinary branch policies and deal with general administration including insurance claims. From 1989, I spent two years cold calling as part of an initiative run by PACL. This was to generate brand new clients for a broader growth strategy than just growing existing accounts.

**Taylor Trading Electrical Wholesalers Trade Counter assistant**  
1974-1976

Serving self-employed contractors and the general retail public with electrical installation equipment and lighting products. Dealing with customer enquiries and keeping up to date the stock controls, ordering and delivering to customer premises.

**EDUCATATION AND QUALIFICATIONS**

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MLIA, Dip, Financial Planning Certificates 1-2 and 3 in Protection, Industry Regulation, Financial Portfolio planning.

Fundamentals module of the Co –Active Coach & Leadership Support recognised by ICF. Ongoing since July 2013.

Institute of Leadership & Management Level 7 Masters certificate in Executive Coaching and Leadership.

**TECHNICAL SKILLS & SUPPORT**

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Personal Coach and Leadership Support through private support provider, Louise Yates, Clear Perspectives.

**PERSONAL DETAILS**

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D.O.B: 24 May 1958  
Married with two children