My Favorite
Strategic Planning Stuff...

Armada Corporate Intelligence:
Covering the market forces bearing down on corporations.
"Companies that are doing well tend to continue to do well, ... and companies that are doing poorly tend to continue to do poorly."

- Carson Levit, Schwab
1/8/19!
Here’s what I hear…and what you know, right?

• Fundamentally - conditions are still strong
  – Employment
  – Growth good
  – Detractors tame
  – Consumers strong
  – Investment still strong

• A bit of uncertainty
  – Tariffs
  – Brexit
  – Shutdown impact

• Long term risks

• Opportunity risks
Strategy is Part Art, Part Science

“IF I HAD ASKED PEOPLE WHAT THEY WANTED, THEY WOULD HAVE SAID: FASTER HORSES...”

Henry Ford
Most companies start with the “Basics”? The Situation Analysis.

3 SWOT Analysis during different project phases

- 1st year: A comprehensive situation analysis as a prerequisite for laying a foundation for a transparent, collaborative definition of the project objectives
- 3rd year: After the first implementation and evaluation phase
- 4th year: After the second implementation and evaluation phase
Harsh Reality. Take a simpler approach...

This report, by its very length, defends itself against the risk of being read.

- Winston Churchill -

quoteparrot.com
## Industry Realities – Total Corporation

<table>
<thead>
<tr>
<th>Significant Changes within the Company</th>
<th>Important Changes in the Marketplace/Technology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Negative</td>
<td></td>
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<tr>
<td>Positive</td>
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</table>

<table>
<thead>
<tr>
<th>Noteworthy Changes in the Competitive Environment</th>
<th>Summary (has our market position improved, decayed, stayed about the same? Why?)</th>
</tr>
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<tbody>
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Simple? No. It’s tough if you are honest.
But, Be Honest for a Second...

1. When does your company build their situation analysis each year?

2. When do you conduct and finish your strategic planning? Is it an annual cycle?

Let me take you back...
Flash back to 2H 2017...

Situation Analysis
Planning Meetings
Setting Budgets
Roll-Out

Shapers of 2017 Environment
Tax Reform
ELDs
First Major Hints of Tariff Wars

July  August  September  October  November  December  January
What’s coming...look at just 4 things...

- February
  - Brexit Decision
  - Tariff Wars intensify or go away.
- March
  - No Decision
  - Intensification
- April
  - Slightly Better Deal
- May
  - New Deal – Open Trade
  - Asian Tiger Recovery.
  - Big change in the dollar?
- June
  - 4 tigers Worsen
  - Global PMI Improves
  - China Surges
- July
  - Hard Brexit
  - USMCA
  - IMO 2020
  - Impeachment
  - China Dives
  - EU Contagion (either/or)
    - Good Brexit = Contagion
    - Bad Brexit = Bad Brexit
  - 2.9%+
- August
  - Slightly Better Deal
  - No Brexit
  - 2%-

@armadacorpintel  www.armada-intel.com
Dynamic Changes coming fast...

- Everyone (in every sector) feeling the transition...an example
- Opened in 1939
- Struggling in one year
More examples...

Amazon, Kiva Systems
There’s a New Paradigm in Strategic Planning...

“Develop the next strategy when conditions have changed. Past practice has been to do a strategy review every year(s). However, developing strategy by the calendar ignores what is happening in the world. DOD should develop its next strategy when domestic or international circumstances have changed enough that the existing strategy is no longer viable.”

To do this, you need a continuous situation analysis or a flexible strategy.
**Corporate Operating Environment / Strategy**

### Old Paradigm

- **Annual Planning Cycle**
  - Point-in-time Situation analysis
  - Strategic Planning Process
    - Objective Setting
      - Identify big Initiatives
      - Budget Setting
      - Measurement

### New/Future Paradigm

- **Dynamic Planning**
  - Continuous Situation Reporting
    - Scenario analysis, future-view storytelling
    - SWAT Team Planning On-Demand
      as market conditions change…and warrant
You Need a FLEX STRAT!!!

These things can change..

Continuous Situation Analysis

Flexible Strategy

Clear Objectives and Beliefs

Understanding Capabilities and Limitations

Sec. Def. Gen. “Mad Dog” Mattis

HE HAS A BEAR RUG IN HIS LIVING ROOM. IT’S NOT DEAD, IT’S JUST TOO SCARED TO MOVE.
Keep it continuous and you’ll know when to flinch, blink, and change your strategy.

1. What are the likely future scenarios?
2. Eliminate the noise.
3. Help executive teams know where markets are headed with enough time and certainty that they can act and get ahead of it.

Here’s what we want to know...when is the market shifting – and where is it shifting to?

Quickly Identify the False Positives

Most Likely Future

Alternative Future

Today 6Months 12Months 18Months
You need real-time briefings – something that analyzes the strategic-impact of events.

Some color behind today's market drop - relative to us.

Apple was a lot of it, it accounts for about 4.7% of the DJIA, 3.9% of S&P 500, and 11.1% of Nasdaq 100. Their China earnings warning started the day off wrong – they have a 20% exposure to China. But throughout the day, we had two pieces of news that weighed more broadly on stocks, and they will remain an underlone among traders:

1. The State Department issued a Level 3 Travel Advisory to China, which exacerbates the China economic slowdown risk.
   a. It warns that local officials could detain “indefinitely” US citizens traveling in China.
   b. It's not unheard of, but it's a rare step to issue it for a country that's so locked into trade with the US.
   c. Could it could take on a similar effect to that of SARS (reducing global travel to China)? SARS cost the global economy $54 billion in 2003, $74 billion at today's rates. Hospitality (multinational hotels with operations in China) and airline stocks took a big hit today as a result.

2. The UK will start warning citizens and ask them to follow the "catastrophic" economic outcome if a “Hard Brexit” happens. A hard Brexit would happen in three months if a current proposal in front of the UK Government is not ratified. Discussions on the "May Plan" (reference to PM Theresa May) start next week and continue over the next three weeks.
   a. The May Plan proposal does not fit with the spirit of the Brexit vote referendum – voters in the UK voted to "remove themselves completely from the EU."
   b. Hard-liners believe in the spirit of the voters referendum, and can't accept anything short of a full withdrawal. Therefore, it could be tough for most lawmakers in the UK Parliament to ratify this “softer”, partial withdrawal plan. Which means no deal.
   c. However, if the Parliament doesn't ratify it, a "Hard Brexit" would happen.
      i. Under a "Hard Brexit", there would be no guarantees of open or free trade, citizenship would be questioned, companies with headquarters in the UK would have to consider relocation, London could lose its financial capital status for Europe, etc.
      ii. Airlines would have to reform travel agreements.
      iii. Shipping lines might not be able to dock and supply chains could grind to a halt.
      iv. It would be a mess, and analysts are just now really starting to come to terms with what the unthinkable would mean. And some are starting to change their exposure to stocks that would be most impacted.

My main point: FedEx, UPS, and XPO could take further big hits to their stocks (down 3.6%, 2.8%, and 4.02% respectively today). There’s no reason for their exposure to China or the UK to pull us down with them (and we were up 1.5% today, thus far the market is being discretionary).

Positively, the swipe of a pen can eradicate both risks. US domestic economic fundamentals remain strong, which is the bottom line for now.

Take care,

Keith

Keith Prather
Strategic Market Planning
Get in front of it.
July 2018: Odd Global Manufacturing Cycle

<table>
<thead>
<tr>
<th>Country</th>
<th>Index</th>
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<tbody>
<tr>
<td>US</td>
<td>58.1</td>
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<tr>
<td>Canada</td>
<td>56.9</td>
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<tr>
<td>Germany</td>
<td>56.9</td>
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<tr>
<td>Eurozone</td>
<td>55.1</td>
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<tr>
<td>France</td>
<td>54.9</td>
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<tr>
<td>UK</td>
<td>54.0</td>
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<tr>
<td>Japan</td>
<td>52.3</td>
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<tr>
<td>Taiwan</td>
<td>53.0</td>
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<tr>
<td>Brazil</td>
<td>50.5</td>
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<tr>
<td>Mexico</td>
<td>52.1</td>
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<tr>
<td>China</td>
<td>50.8</td>
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<tr>
<td>S. Korea</td>
<td>48.3</td>
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Trend

Accelerating

Decelerating
Customer Value and Competition

Marketing is not the art of finding clever ways to dispose of what you make. It is the art of creating genuine customer value.

— Philip Kotler —
Historical market position is an estimate. Axis is based on latest research wave.
**Decision Matrix vs. [Competitor]**

<table>
<thead>
<tr>
<th>Conscious / Latent</th>
<th>Industry Importance</th>
<th>Target Co. Disadvantage</th>
<th>Little Perceptible Difference</th>
<th>Target Co. Advantage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fix</td>
<td>No Damages</td>
<td>Picked up when promised</td>
<td>Competitive Transit Times</td>
<td>Fix (Low Priority)</td>
</tr>
<tr>
<td></td>
<td>Delivery when promised</td>
<td>Cust. Service Responsive</td>
<td>On-Time Deliveries</td>
<td>Promote/Fix (Low Emphasis)</td>
</tr>
<tr>
<td></td>
<td>Carrier Responsiveness</td>
<td>Flexible Ops</td>
<td></td>
<td>Promote (Low Emphasis)</td>
</tr>
<tr>
<td>Promote/Fix</td>
<td>Ease of doing business</td>
<td>No shortages</td>
<td>Problem Resolution</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Promote</td>
<td>Helpfulness Sales Reps</td>
<td>Carrier</td>
<td>Trustworthy</td>
<td></td>
</tr>
</tbody>
</table>

- **Fix**
  - No Damages
  - Picked up when promised
  - Delivery when promised
  - Carrier Responsiveness
  - Flexible Ops

- **Promote/Fix**
  - Ease of doing business
  - No shortages
  - Problem Resolution

- **Promote**
  - Helpfulness Sales Reps
  - Carrier is Trustworthy
Competition: You need a perspective.

Overmatch.

"I do not try to dance better than anyone else. I only try to dance better than myself."

—Mikhail Baryshnikov
Kotler Competitive Positioning Map

Market Leader

Inner Circle Aspirations

Leader $56B

Wannabe $42B

Market Challengers

Our co. $11B

XZZX $7.5B

Them $8B

BHM $1.5B

DTG $4.5B

PKB $1.8B

Market Followers

WQD $5B

Our co. $11B

Nichers

Small Focused Manuf.

Growth Oriented Small Manuf.

Small Focused Manuf.

APL $8B

PLP $9B

ADR $8.5B

OLO $19B

1234 $23B

XX $21B

XXX $20B

Gross Revenues

< $1B

< $8B

> $40B

Megacorp $100B

Mega II $90B
# Wichita Primary Competitive Market Map

**Market Leader(s)**
- Target Co.

**Market Challengers**
- GSI
- Mkec
- Cook, Flatt and Strobel
- Poe and Assoc.
- WSP

**Market Followers**
- Baughman
- Dudley Williams
- Basis
- Morrow
- Garver
- Jaco
- Schwab-Eaton
- Kaw Valley

**Nichers**
- Global Aviation Tech.
- Foster Design
- Ti Enter.
- G Force
- 3 S Engin.
- Transystems
- Stearns, Conrad, Schmidt
- Terracon
- Dubois
- Ink Constr.
- Ruggles and Bohm
- Trademark Inc
- KE Miller
- TEC
- Certified Eng. Design
- Small
- Large
### Tulsa Primary Competitive Market Map

<table>
<thead>
<tr>
<th>Market Leader(s)</th>
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<tbody>
<tr>
<td>• Linde</td>
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</table>

<table>
<thead>
<tr>
<th>Market Challengers</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>• Poe and Assoc.</td>
<td>• Target Co.</td>
</tr>
<tr>
<td>• Matrix PDM</td>
<td>• Select Engineering</td>
</tr>
<tr>
<td>• Wallace</td>
<td>• Tetra Tech</td>
</tr>
<tr>
<td>• Enercon</td>
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</table>

<table>
<thead>
<tr>
<th>Market Followers</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Guy Engineering</td>
<td>• Meshek and Assoc.</td>
</tr>
<tr>
<td>• EDG</td>
<td>• Sack and Assoc.</td>
</tr>
<tr>
<td>• Excellence</td>
<td>• MPW</td>
</tr>
<tr>
<td>• Tulsa E&amp;P</td>
<td>• Houston Interests</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Nichers</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• All Consulting</td>
<td>• Cyntergy</td>
</tr>
<tr>
<td>• Flintco</td>
<td>• UOP Russell</td>
</tr>
<tr>
<td>• Many small Oil and Gas Firms</td>
<td>• B&amp;T (wireless)</td>
</tr>
<tr>
<td>• Willbros</td>
<td>• Qps</td>
</tr>
<tr>
<td>• Woolslayer</td>
<td>• B&amp;T (wireless)</td>
</tr>
</tbody>
</table>

**Small**

**Large**
Market Leaders are always on the defensive…and will take one or more of six defensive strategies against challengers.

- **Position Defense** (make impenetrable)
- **Mobile Defense** (Open New Markets)
- **Preemptive Defense** (Best Defense – Good Offense)
- **Counteroffensive Defense** (Hard Counterstrike)
- **Flanking Defense** (Protect the Flanks, fortify)
- **Contraction Defense** (Exit the market)

Market Challenger Attack Maps

- **Guerilla Attack** (Cumulative Intermittent Attacks)
- **Frontal Attack** (Go after Competitor’s Core)
- **Flank Attack** (Strength against Weakness)
- **Encirclement Attack** (Grand Offensive)
- **Bypass Attack** (Build stronger resource base by attacking indirect markets)

Learn from the Market Leader...

Competitive Gaps Get Accentuated...

2Q17 EBITDA Margin

Second place had margins 11.6 points lower!
## Vision: Were are we headed?

<table>
<thead>
<tr>
<th>Question</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who would you consider to be “Best in Class” in this area?</td>
<td>Where do we rank in the sector? (If we don’t have the ability to rank – think about one of these categories: Upper third, Middle third, Lower third)</td>
</tr>
<tr>
<td>Estimate of their annual revenue/size?</td>
<td>Are we a Market Leader, Market Challenger, Market Follower, or Nicher?</td>
</tr>
<tr>
<td>What special capabilities do they have that make them BIC?</td>
<td>Think big, is there a “huge”, single move we could make to become BIC?</td>
</tr>
<tr>
<td>Where are the <strong>biggest gaps</strong> that prevent us from being considered BIC alongside this competitor?</td>
<td>Are there <strong>values</strong> that are absolutely non-negotiable in pursuit of BIC?</td>
</tr>
</tbody>
</table>
2003 – The “Red Ball of Death”

• “One” slide led to two acquisitions totaling $5 billion.
  – Impacted 80,000 workers and their families directly.

• Reset an entire industry.

• Became a strategic mainstay.

• Is pretty good at predicting winners and losers over time.
The Red Ball of Death – Department Stores

- Macy's
- Kohl's
- Sears
- Bon Ton
- JC Penney
- Nordstrom
- Dillard's
- Amazon

Margin Est vs Share Est graph showing the performance of various department stores compared to Amazon.
The “P” Word.
Where will **PROFIT** come from?

### Increase Profits

- **Improve Productivity / Reduce Costs**
  - Through Existing Assets
  - Change Assets
    - Cost Reduction / Automation ___%
    - Improve current asset utilization / Automation ___%
    - Raise prices or reduce discounts ___%
    - Improve business mix (margin improvements) ___%

- **Grow Revenue**
  - Penetration of Current Markets
  - New Markets
  - New Services/Products
    - Sell to new customers or industry segments ___%
    - Convert non-users ___%
    - New services meeting needs of a completely new market ___%

### Totals

- Increase usage ___%
- Take market share from competitors ___%
## Prioritization Chart – 2 Key Versions

<table>
<thead>
<tr>
<th>Ease of Implementation</th>
<th>Strategic Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple</td>
<td>Evolutionary</td>
</tr>
<tr>
<td>Complex</td>
<td>Revolutionary</td>
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</tbody>
</table>

**Evolutionary**
- Expensive, but key to long term differentiation.
- Do these today.

**Revolutionary**
- Maybe expensive, but more difficult to follow. Some short term gains here.
- Too easy to copy, probably a low priority but could become a table stake.
Prioritization Chart – 2 Key Versions

Profit Potential
- Low
- High

Strategic Fit
- Poor
- Strong

The chart shows the prioritization based on profit potential and strategic fit. The top right quadrant is the area of highest priority (High Profit Potential and Strong Strategic Fit).
## Grow / Harvest / Shed

<table>
<thead>
<tr>
<th>Invest and Grow</th>
<th>Sustain (mild investment)</th>
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<table>
<thead>
<tr>
<th>Prove Viability (uncertain)</th>
<th>Harvest (little or no investment)</th>
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<th>Withdraw/Spin-off/IPO/Divest</th>
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Getting to a Strategy...

- Developing strategy and **thinking strategically** is a quickly disappearing art.

1. Objective
   - Qualitative
   - Quantitative

2. Strategy
   - “To” “By” rule...

   • To offer the world’s best hamburger by procuring the world’s best meat, freshest ingredients, providing the widest variety of toppings available, and making it easy for customers to fully personalize every burger.
To throw the perfect strike, you aim for pins 1 and 2, or 1 and 3 and the rest are likely to fall.
Strategy and Destination

2010 Forecast Revenue Mix
- West Region: 39%
- East Region: 28%
- South Region: 18%
- North Region: 15%

2013 Projected Revenue Mix
- West Region: 33%
- East Region: 28%
- South Region: 22%
- North Region: 17%

Shift Regional Sales:
Utilize redistribution of sales personnel to shift product sales mix to regions with less competition.

Portfolio Diversification:
Introduce new products to reduce overall contribution of primary product line by 5% year-over-year.

Increase Brand Awareness:
Increase brand recognition and improve awareness through targeted advertising promotions and selected event management opportunities.

Revenue: $x,xxxM
Operating Income: $xxxM
EBITDA (%): $xxxM (xx.x%)
Days Sales Outstanding: xx
## Drilling in to Initiatives

<table>
<thead>
<tr>
<th>Initiative / Opportunity</th>
<th>Ties to What Strategy?</th>
<th>Who's Going to Lead This Effort?</th>
<th>What Quarter will we initiate it?</th>
<th>Dependencies on other areas.</th>
<th>Critical Success Factor</th>
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# Stop Doing List – To Free up resources

<table>
<thead>
<tr>
<th>Activity</th>
<th>Cost/Hours</th>
<th>Responsible Person</th>
<th>Other Areas Reliant upon this Activity</th>
<th>Work-a-Round / Substitute Source / Automate?</th>
<th>Likely Target Area for Redeploying Resources</th>
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Get a PMO.

(Project Management Office)
Accelerators...
DUAL TRANSFORMATION – CONCEPT

REPOSITION

Reposition today’s business to maximize its resilience

(Transformation A)

CREATE

Create tomorrow’s growth engine

(Transformation B)

UTILIZE

Use unique skills and resources that give you an advantage

(Capabilities Link)

Source: Innosight “Dual Transformation”
Strategic Punchlist:

1. Start a Continuous Situation Analysis Process today.
2. Simplify the planning SWOT.
3. Really, really, really understand your customers and what they value.
4. Dive deep into the competitive environment. Know it and be real about it. Be clear about what your view on competition is – Overmatch or Baryshnikov?
5. Learning from a Market Leader is Ok. Being a Follower is OK.
6. Narrow your focus. 3-4 major initiatives.
7. Get a PMO.
8. And lastly…be real.
Leave you with a Harsh Reality: the Triad...

Referee

CEO
Pres., SVP,
C-Suite

CMO,
CIO, CTO

CFO,
COO, CRO

War is too serious
to trust it
to generals

~ Winston Churchill ~

Dreamer

Realist
Questions?

Love all Y’all!

Keith Prather
kprather@armadaci.com