

ABOUT

navigo



**YOUR OPERATIONAL STRIKE FORCE FOR
REDUCING COSTS, OPTIMIZING EFFICIENCIES,
AND STRENGTHENING RISK MANAGEMENT.**

WHY NAVIGO?

All businesses have core components, such as processes, vendors and resources, and the management of risk that comes with operating.

Most organizations do not have the time and bandwidth to routinely and proactively monitor and evolve these interconnected functions.

That is why we created Navigo. We are a unique service, combining holistic white glove vendor management services with business process and risk management advisement.

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OUR EXPERIENCE

Our leadership draws upon **decades of combined operational, legal, risk management, and leadership experience** with Top Global Law Firms and Fortune 500 Companies to form and offer Navigo.

Our decades of experience comes from in the trenches work, leading teams, and advising executive leadership.

We are not career consultants, **we are your dedicated partner** deeply experienced in the solutions we provide to our clients.

We use our knowledge and experience to build our unique holistic offering of vendor management services, operational and risk management advisement, and special projects to keep our clients, no matter the size or industry, operating at peak performance, efficiency, fiscal strength, and sophistication.

MEET OUR FOUNDERS



STUART POOLE

FOUNDER AND CEO

Stuart has spent over 20 years advising large professional service firm leaders on business processes & technology. He has since transitioned to start Navigo, fueling his passion for helping companies find value and efficiencies in their operations.



KURT SCHUETTINGER

FOUNDER AND CLO

Kurt has spent over a decade advising Fortune 500 companies on Intellectual Property Issues. In starting Navigo, Kurt brings his deep legal and contract experience to guide the company and our clients.

VENDOR AUDITING SERVICES

We provide full auditing of all the vendors, contracts, licenses, and policies that support your operations.

AUDITING SERVICES

We provide extensive auditing of your vendors and contracts to find:

- ◆ Cost Savings
- ◆ Spend Reduction
- ◆ Payment Overages
- ◆ Bill and Usage Aberrations
- ◆ Escalation Clauses
- ◆ Redundancy Elimination Opportunities
- ◆ Consolidation Opportunities
- ◆ Untapped/Underutilized Contract Provisions and Service Levels
- ◆ Alternative Options and Ideas

After our review, we will provide you with our findings and recommendations. With your authorization, we will deal directly with your vendors to execute your wishes.

Our mission is to provide you with a full summary of all your vendors and accounts, together with solutions we can execute to save money, eliminate waste, and maximize your operational investments.

VENDOR MANAGEMENT SERVICES

We provide full management of all the vendors, contracts, licenses, and policies that support your operations.

MANAGED SERVICES

We provide holistic management of all your vendors and contracts, by performing:

- ◆ Selection and Onboarding
- ◆ Contract Management
- ◆ Information Management
- ◆ Relationship Management
- ◆ Monitor Terms and Fees
- ◆ Audit Support and Issue Resolutions
- ◆ Renewals and Negotiations
- ◆ Contract Terminations

We use our state-of-the-art, highly secure encrypted portal to manage every aspect of your vendors and contracts, while providing you with unlimited access and automation tools for our collaboration. Our investments in technology become tools for your operations.

By partnering with Navigo, you get a resolute team with a mission to offload your operational burdens, while reducing your costs, maximizing resource utilization, and consistently and vigilantly watching your accounts, contracts, and the market for opportunities.

VENDOR CONCIERGE SERVICES

CONCIERGE SERVICES

We provide concierge services to manage your licenses and policies by performing:

- ◆ Research and Identification
- ◆ Application Preparation
- ◆ Filing Submissions and Follow-Up
- ◆ Information and Records Management
- ◆ Compliance Monitoring
- ◆ Audit Support and Issue Resolutions
- ◆ Renewal Preparation
- ◆ Cancellations

Our mission is to reduce your burden of effectively managing the licenses and policies that support your business.

BUSINESS PROCESS ADVISEMENT

OPERATIONAL BUSINESS PROCESSES

We find efficiencies and resource optimization opportunities in your business processes, workflows, technology, and teams. We focus on:

- ◆ Processes | Workflows
- ◆ Forms | Reports
- ◆ Data Capture and Maintenance
- ◆ Current Technology Utilization
- ◆ Future Technology Evaluations and Selection
- ◆ Team Structures and Roles

Our mission is to provide immediate solutions for your current state, while providing future state strategies that we can execute together.

RISK MANAGEMENT ADVISEMENT

OPERATIONS | CONFLICTS | BUSINESS INTAKE | LATERAL INTEGRATION

We provide a deep analysis of your current state of business processes, conflicts, business intake, and lateral processes, and provide solutions for gaining efficiencies, minimizing costs, strengthening risk management, and reducing burdens on fee earners and support staff.

We also provide advisory services through vetting, selecting, and migrating to new conflict and business intake technologies. We are fully independent of any vendor relationships and have deep experience advising clients through the selection and implementation of different software products.

Our mission is to find opportunities for immediate improvements, maximizing your technology investments, and advancing your firm or business toward your desired future state.

ADVISEMENT FOCUS AREAS

OPERATIONS | CONFLICTS | BUSINESS INTAKE | LATERAL HIRES

During our advisement, we take a deep dive into conflicts, business intake, and lateral hiring areas and provide recommendations for immediate improvements and strategies for achieving a more advanced future state.

Some select limited examples include:

Forms

- ◆ Form Fields
- ◆ Data Capture
- ◆ Roles and Positions
- ◆ Storage and Integrations

Reporting

- ◆ New Business & Conflicts Reports
- ◆ Lateral Reports
- ◆ Storage and Integrations

Teams

- ◆ Responsibilities, Roles & Duties
- ◆ Transition Paths
- ◆ Training

Processes, Procedures, and Policies

- ◆ Corporate Structure Research
- ◆ OFAC and Banned Parties Lists
- ◆ Search Terms, Formulas, and Strategies
- ◆ Hit Selection
- ◆ Conflict Clearance & Ethical Walls
- ◆ Engagement Letters & Waivers
- ◆ Outside Counsel Guidelines

Technology, Subscriptions, and Contracts

- ◆ Current Technology Utilization and Integrations
- ◆ Current Subscriptions Utilization and Integrations
- ◆ Current Contracts Terms & Conditions
- ◆ Potential Cost Savings
- ◆ Under-Utilized Provisions
- ◆ Support Clauses
- ◆ Renewal Terms

TECHNOLOGY ADVISEMENT

TECHNOLOGY SELECTION + IMPLEMENTATION ADVISEMENT

Conflicts | Intake | Lateral | Ethical Wall | Other Related Technologies

We advise on fully optimizing your existing technologies to maximize the value of these investments, and advise clients through the research, vetting, selection, and implementation of new software. We are fully independent of any vendor partnerships, and have deep experience advising clients through the selection and implementation of different software products by:

- ◆ Requirement Gathering
- ◆ Internal Interviews
- ◆ RFP Formation
- ◆ Demo Evaluations
- ◆ Vendor Interviews
- ◆ Reference Interviews
- ◆ Implementor Interviews
- ◆ Summary Analysis Reporting
- ◆ Contract Advisement
- ◆ Implementation Strategies
- ◆ Blueprinting + Sandboxing
- ◆ Testing
- ◆ Training
- ◆ Management Communications
- ◆ Roll-Out + Go Live Strategies
- ◆ Post-Implementation Advisement

M&A ADVISEMENT

We provide advisement for performing pre-merger diligence and services for post-merger integration.

M&A DILIGENCE

We advise through the diligence phases of mergers, acquisitions, and combinations by providing strategies for:

- ◆ Project Organization and Standardization
- ◆ Facilitating Communications and Meetings
- ◆ Managing Information, Documents, and Records
- ◆ Performing Research and Conflicts Checks
- ◆ Information Review
- ◆ Clearance Remedies
- ◆ Approvals
- ◆ Next Steps

Our mission is to provide your business with a well-organized strategy that will reduce the burden on internal resources, keep the project moving, provide proper vetting, and give you the knowledge and information needed to maximize success. We will be with you every step of the way.

M&A TRANSITION SERVICES

We provide advisement for performing pre-merger diligence and services for post-merger integration.

M&A INTEGRATION

We advise on strategies to optimize seamless integration and minimal disruption for the new entity. We evaluate all combined operational and risk management resources and provide recommendations on how and what to move forward with.

Our vendor management team will assist with the transition and will fully manage the new entity's vendors.

Our mission is to be your dedicated resource to effectively navigate the operational and risk management aspects of a merger, so you can focus on your business, clients, and personnel.

SELECT BUSINESS EXPERIENCE

NATIONAL CREATIVE AGENCY

Evaluated enterprise-wide services to find potential savings by switching vendors and/or consolidating contracts, identifying multiple options to save money and resources.

Provided reporting on necessary compliance and business requirements to hire new employees in a different state.

Provided summary and comparative analysis of global expansion opportunities in three major international capital cities.

Performed a market analysis of competitive employee benefit options in targeted major city markets.

Performed research and identified different AI tools to aid specific internal operations.

ATLANTA CHAPTER OF A GLOBAL CHARITY

Evaluated existing utilities and services for cost savings, provided alternative market options, and facilitated the installation of a better vendor, netting roughly \$2000/year in savings.

REALTOR FIRM

Evaluated all existing utilities against alternative options, ultimately finding a new and better vendor in terms of both cost savings and contract terms.

CONSTRUCTION COMPANY

Performed review of existing internal forms and advised on enhancing data capture vital to the company's success.

IT FIRM

Routinely used to identify better vendor options for the firm's clients.

HEALTH & FITNESS CLUB

Provide month-to-month management of all utilities, resulting in routine cost and time savings.

MEDICAL PRODUCTS COMPANY

Obtained and provided business license management for a foreign medical company expanding operations into the United States.

BOUTIQUE LAW FIRM

Provided research and concierge services to successfully find a new utility service and hardware provider with the best market pricing and contract terms.

SELECT LAW FIRM EXPERIENCE

The examples below are from a culmination of the decades of experience of our founders.

TOP 25 GLOBAL LAW FIRM

Advised client regarding its existing business processes and workflows related to business intake, conflicts, and clearance, resulting in numerous successful recommendations addressing client's challenges.

TOP 20 GLOBAL PROFESSIONAL SERVICES FIRM

Successfully created a new global conflicts and business intake process for client, and provided advisement and detailed analysis of supporting technologies.

TOP 25 GLOBAL LAW FIRM

Advised client leadership on improving and properly integrating existing processes and personnel roles with new inbound conflicts and intake software.

TOP 100 GLOBAL LAW FIRM

Provided a full assessment of all existing conflicts, business intake, and lateral integration processes and workflows, successfully finding numerous recommendations for optimizing efficiencies for client. Successfully advised on selection through the implementation of new conflicts and business intake software.

TOP 100 GLOBAL LAW FIRM

Advised client on updating existing conflicts, business intake, and lateral hire processes and workflows to integrate with new inbound conflicts and intake software, helping to maximize the functionality and investment of new inbound conflicts and intake software.

TOP 100 GLOBAL LAW FIRM

Provided client with guidance and advisement through deep analysis and vetting of new inbound conflicts and business intake software, while updating existing processes and workflows to maximize integration success, optimizing the new software's functionalities, and fortifying risk management.

TOP 200 NATIONAL LAW FIRM

Provided client with a full audit of existing conflicts, business intake processes, workflows, technology utilization, and personnel roles and responsibilities, successfully finding and executing recommendations maximizing operational efficiencies, strengthening risk management, and optimizing technology utilization.

NATIONAL MULTI-PRACTICE LAW FIRM

Provided client with a deep analysis of current business operations and risk management functions, successfully providing recommendations to help client gain process efficiencies, maximize functionality of existing supporting software, and bolstering growth strategy initiatives.

CONTACT INFORMATION

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Scan for Stuart Poole's business card

ADDITIONAL RESOURCES

[Info Sheet](#)
[Schedule a Call](#)