

HSD Arctic Conference: Breath of Fresh Air

By Craig Acosta

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Our spirits were high as HSD descended on Minneapolis for its off-site retreat. The mood was ebullient as HSD celebrated the conclusion of an outstanding sales and revenue year.

Putting the practice in perspective, leader Mark Wietecha said, "We're on an evolving journey. Many of us may want to freeze in place; we probably won't. I feel really good about two things: 1) We have really good people. We've made it through some major transitions and have come out strong; and 2) We have beat the best (competitors) for the best (our clients) with the best (our people)."

In response to last year's evaluations, HSD's off-site meeting abandoned the usual service group updates and conducted two days of rigorous professional development. As a group, HSD has a notorious reputation for not taking KSA professional development courses. Mark Wietecha charged me with discovering what HSD professionals were looking for and developing a program to complement a conference setting.

We surveyed all HSDers on their professional development interests and developed a curriculum based on the survey responses. Most responses indicated an interest in health care-related topics. Since our group contains many of the nation's leading experts on the requested topics, we looked to our senior leaders to teach our classes. Courses offered ranged from "Trends in Health Care Technology" to "Vision: Not Just for Schizophrenics;" from "Maximizing Sales Response and Conversion" to "Tackling Performance Challenges." Each participant also benefited from a Speechworks public speaking course about developing winning sales presentations, presenting as a team, and speaking to national audiences.

To conclude a wonderful retreat, HSDers had an opportunity to mingle one last time during a dinner honoring KSA founders Tom DeChant, Chuck Killian, Meredith Spear, Peter Weil, and KSA retired founders Bruce Miller, Barry Moore, Bucky Knowles, Dick Sawyer, and John Sweetland. In the end, great learning and camaraderie were experienced by all participants.

Left to right: John Sweetland, Bucky Knowles, Peter Weil, Dick Sawyer, Barry Moore, Bruce Miller, Tom DeChant, Meredith Spear, and Chuck Killian



Moving Forward Together

By Bill Pace



“Thank you for all you have contributed and all you will contribute as we advance our position as the premier consulting firm serving the consumer products, retail, and health care industries.”

Happy New Year to you and your families! As we close off one year and begin the next, I want to thank you for your part in making KSA such a terrific community and firm. I had the privilege of spending time with many of you in 2003. Whether we were presenting deliverables, problem solving in meetings and conferences (sometimes wearing animal-shaped hats or other paraphernalia), or waiting for flights, I found each of you to be intelligent, engaging, fun, and full of life. You enhance our work experience and the environment of everyone around you with your ideas and energy.

We were one busy firm in 2003:

- We increased our market penetration in the retail and grocery sectors.
- On the heels of last year’s successful launch of the Health Care 2020 thought leadership piece, we started a newsletter, *KSA Outlook*, which targets health care, and have now published four issues.
- We delivered outstanding results for clients such as Aeon, Avon, DuPont, Food Lion, Matalan, MFI, and Talbots in CPD. In HSD, we have completed assignments at the No. 1 hospital in every market we serve. Current HSD clients, whose names you may recognize, include Johns Hopkins, University of Chicago, Mass General, and University of California at San Francisco (UCSF).
- We made several key senior hires throughout the firm, while continuing to develop and promote from within KSA.

- We evolved our services, formed new alliances, gained new industry insights, and built new technical capabilities.

- We made substantial headway in formulating the Firm’s strategic direction.

As you know, one of our priorities as a firm has been to regain our KSA center. A primary vehicle for rebuilding community and reasserting our culture is staff conferences. To foster solidarity, knowledge, sharing and some well-needed rest and relaxation, no less than seven conferences were held this year — each resulting in stronger teams, knowledge transfer, and lots of great memories. In fact, a few of the conferences have been highlighted in this and other editions of the *Observer*. Stay tuned for entertaining tales and pictures.

Key practices in North America held conferences throughout 2003:

- In the spring, the CPD IT practice met in Dallas and was treated to ninjas kidnapping Glenn Hershey, a trade show displaying the latest software, and the leadership team in a dunking machine.
- In early summer, the Fulfillment practice visited Tony DeMaria’s vineyard home outside of Atlanta and experienced a town hall meeting, country fair, and Jack Horst taking a late night swim.
- In the fall, the Strategy practice enjoyed the sea air of Northern California while brainstorming about the \$1 million strategy project and watching Jim Neal stomp grapes into wine.

- Also in the fall, the Merchandising practice met in Phoenix where it explored the Store of the Future and shared best practices for managing change at large clients. It also built, and then raced, some creatively designed covered wagons.

- The Health Care practice met in Minneapolis in November for a series of workshops and simulations aimed at professional development. One evening's theme, "On the Shoulders of Giants," honored the visionaries and mentors who built KSA's health care practice and helped transform the health care industry: Barry Moore, John Sweetland, Bruce Miller, Bucky Knowles, Chuck Killian, Dick Sawyer, Peter Weil, Tom DeChant, and Meredith Spear (See page 1).

The European conference was held in September at a resort in Salou, one hour south of Barcelona. The group explored future trends in retailing, lifestyle patterns in European countries, and being Net Ready. They also displayed some exuberant dance moves in between work sessions.

The Asian practice convened at beautiful Lake Hakone at the foot of Mt. Fuji. They shared information and project updates, experienced traditional Japanese dining, and went golfing, hiking, and sightseeing along the ropeways to the volcanic vents at Owakudani (See page 20).

I was able to join these celebrations of consulting at KSA and came away stimulated, excited, and smarter. Our KSA center is alive and well and poised for success in 2004. I trust the year ahead will be even more enjoyable and productive. Thank you again for all you have contributed and all you will contribute as we advance our position as the premier consulting firm serving the consumer products, retail, and health care industries.

A "SAGE" Approach at CMF

By Gretchen Koch

A cool, windy October day in Chicago was the setting for the 11th annual Consumer Markets Forum. Formerly held in San Francisco until this year, the packaged goods strategy group changed its venue to attract Midwest packaged goods companies.

The forum was an opportunity for KSA to share its thought leadership on current packaged goods industry issues and to interact with current and target clients. It also allowed senior industry executives to network with their peers.

The 2003 Consumer Markets Forum was a one-day event that included a presentation of SAGESM (Strategic Action Growth Generator), KSA's proprietary strategic model for generating growth in the consumer packaged goods industry. The SAGE framework was brought to life through external presentations by five senior packaged goods executives who shared stories of how they achieved exemplary growth in their businesses.

The session was led and moderated by KSA principal, David Sterry, who began the day by asking the audience of seasoned industry executives, "What drives growth? How can you get more than your fair share of growth?" None of the attendees could provide a clear formula for driving growth. Dave provided KSA's perspective, the SAGE framework.

SAGE is based on analysis of 400 strategy assignments and a review of every packaged goods category over \$50 million. Using five years of syndicated data, KSA built case studies of 165 of the top growth stories, and discovered that there were common elements that made companies successful, and that

these elements could be defined as four distinct types of growth strategies:

- Companies that grew using competitive attrition were able to gain share in mature categories by out-executing the competition at every turn.
- Businesses drove top-line growth through commercialization of an emerging product, bringing it to the mainstream.
- Companies have expanded the boundaries of an existing category, changing multiple elements of a product proposition to reach new users or create new usage occasions.
- Finally, organizations that have excelled at pioneering have also created a new category of products.

Growth stories were presented by General Mills' Cheerios cereal and Pop Secret popcorn, Church & Dwight's Trojan condoms, Gillette's Venus female shaving system, and Procter & Gamble's Swiffer cleaning appliance system.

Here are some interesting tidbits from our CMF speakers:

Competitive attrition: Cheerios. Ann Simonds, Vice President of Marketing for Cheerios, explained how General Mills employed the competitive attrition strategy to drive top-line growth. It started by developing tightly defined targets and reinvigorating itself through a healthy brand positioning. Cheerios is viewed as an ideal first finger-food for toddlers, as well as an important part of a heart-healthy diet for adults.

(Continued on page 7)

Four Years and \$4M at Staples

By Bob Smith

More than four years ago, we began working with Staples, the \$11.6 billion retailer of office supplies with more than 1,500 office superstores that operate in the United States, Canada, the United Kingdom, France, Italy, Spain, Belgium, Germany, the Netherlands, and Portugal. Within this timeframe, KSA has incurred more than \$4 million in fees.

We opened the door to Staples through a personal relationship I've had with a long-time friend and business contact there. But once we were in the door, we proved our capabilities through superior work, which then allowed us to expand our involvement through innovation by "out-of-the-box thinking." To understand how we did this, let me explain Staples' company background and KSA's work history with this client.

Staples has two divisions: North American Retail, with more than 1,300 retail stores nationwide, and North American Delivery (NAD), comprised of business-to-business and direct-to-con-

sumer customers. KSA has been most involved in the NAD side of the business, which I'll describe here.

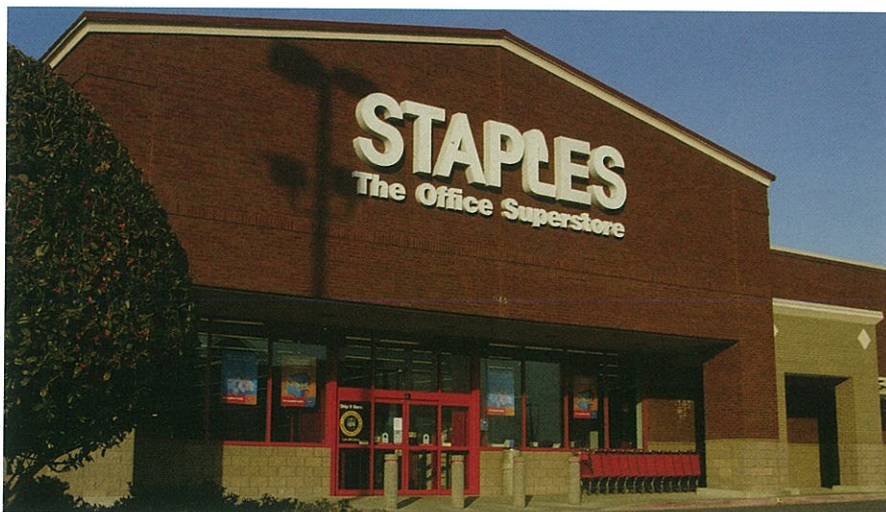
NAD has a logistics network of 28 Fulfillment Centers (FCs) and more than 150 regional delivery hubs. The service commitment is next-day delivery, five days a week. Out of KSA's 30+ current projects, one of the most significant, from an ROI perspective, is the implementation of a new Warehouse Management System (WMS) package in a majority of the FCs that began four years ago. It was KSA's first project with Staples.

KSA was hired to help Staples develop and execute training and testing materials to implement the new WMS. This project allowed us to demonstrate KSA's exceptional work ethic and quality.

While the implementations had been considered a success from a functional standpoint, Staples had not achieved the productivity increases projected to justify

the new WMS. At this point, we developed an innovative solution. We suggested combining one of our most successful service offerings, performance improvement, with the WMS implementation. We believed combining the two efforts would help Staples achieve the promised productivity increases with the new WMS and an additional productivity increase through a structured performance improvement program.

To date, the WMS has been implemented in six FCs. Three of the six Staples FCs that have the new WMS have also implemented the performance improvement program. Productivity has increased more than 40%, which has allowed Staples to make better use of its work force. Through a good relationship, an exceptional work ethic, and highly innovative thinking, KSA will work to help Staples achieve continued success.



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KSA Ranked Top 10 in Consulting

By Bill Pace

As we move out of some of the roughest sailing the consulting industry has ever experienced, we should keep clearly in focus what has historically set KSA apart — the very high quality of its consulting talent. KSA continues to attract this talent because of the culture we have created.

In a recent announcement from me, you read that KSA has been named one of “the top 10 consulting firms to work for” in survey results released by *Consulting Magazine*, from Kennedy Information. Overall, KSA ranked No. 7 in this highly influential survey.

Many of you have asked how the survey was conducted. *Consulting* used the *CN 75*, the largest consulting firms ranked by worldwide revenue and published by *Consultants News*.

Consultants were surveyed regarding six categories as follows: culture, leadership, on-the-job, work/life, career development, compensation and benefits. From these categories, subsets were created.

Consulting received 5,457 submissions from professionals at 50 firms. The other 25 firms on the *CN 75* did not submit enough responses to be included.

Details of KSA's ranking:

Culture: Overall rank: 6.

KSA tied for No. 1 with Bain & Company for being “most proud of our firm,” and No. 5 regarding “feel creativity is encouraged.”

Leadership: Overall rank: 3.

KSA ranked No. 3 in the category “managers create a positive work environment,” and

No. 5 for “they know the firm’s strategy and direction.”

On-the-job: Overall rank: 3.

Answering the question, “Do you find it easy to deliver on commitments,” KSA ranked No. 4. Almost one-third of us said “always” and more than half said “very frequently.”

“...KSA has been named one of ‘the Top 10 Consulting Firms to Work for, 2003’ in survey results released by *Consulting Magazine*, from Kennedy Information. Overall, KSA ranked No. 7 in this highly influential survey.”

KSA ranked No. 4 when answering the question, “How interesting do you find your work on a typical assignment?” More than three-quarters of us agreed the work is stimulating. KSA ranked No. 1 regarding “satisfied with size of client companies;” No. 3 regarding “satisfied with the level of management you work with;” and No. 4 regarding “our firm’s organizational structure has a positive impact on your work.”

Work/life: Overall rank: 6.

KSA ranked No. 5 regarding satisfaction with sabbaticals/personal time/sick leave, and No. 3 on vacations. Regarding flexible work arrangements, KSA ranked No. 2, as 93% of us are satisfied with KSA’s flexible work arrangement.

Career development: Overall rank: 8.

In response to the question, “How satisfied are you with your company’s training and development opportunities?” KSA ranked No. 5, as 83% of us said we are satisfied or very satisfied. The *CN* article points out that some firms, such as KSA, are not offering as many formal training days, but our apprenticeship model greatly benefits young consultants.

Compensation and benefits: Overall rank: 7.

Many survey respondents indicated their companies’ 401K contributions had been trimmed during the economic downturn. KSA continues its 401K corporate matching program, and its target retirement plan is excellent.

In its overview of the top 10, the *CN* survey asked, “How would you rate employee morale?” KSA ranked No. 6, with 80% of respondents saying morale is high or very high. The writers commented that public firms feel pressured to make short-term decisions for the market while private firms, such as KSA, can take a long-term view.

The culture of excellence we have all worked so hard to create significantly enhances our ability to attract and retain the most talented consultants and gives us an important competitive advantage in any economy.

Congratulations to us all!

*Note: If you would like to read the entire article, it is published in the November/December 2003 issue of *Consulting Magazine*.*

Advanced Retailing @ METRO Group

By Heiner Spalink, Wolf Wagner, Giovanni Pozzoli

What can a company that is already perceived to be a technology and market leader do to further improve its position in the industry? That is exactly what METRO Group enlisted KSA to determine.



John-Louis Simoneau, one KSA member of the METRO Group initiative

The METRO Group is best known for its METRO/MAKRO wholesale “cash and carry” markets. However, these markets account for less than half of the total turnover. METRO also operates food/non-food supermarkets and hypermarkets as well as consumer electronics, apparel, and DIY stores under different brand names. International expansion is one of the key strategic pillars, with about 50% of METRO’s annual turnover of 51.5 billion being generated outside of the German market and 40% of its 235,000 employees working abroad. In terms of sales, the METRO Group ranks a close fifth place worldwide. In Europe, it is perceived to be one of the major technology trendsetters in the retail industry.

After thoughtful research, KSA recommended that METRO take a step back and look at the big picture in terms of supply chain optimisation, customer and supplier collaboration, and the

use of technology. It discovered that METRO ran its business the way many big companies do: pursue an extensive amount of (good) ideas and projects without keeping track of costs and effort.

In a first analysis in 2002, a KSA team discovered that the METRO Group is strong in the development of new ideas and technologies, but ranks poorly when it comes to delivering and leveraging the results of these efforts across the whole organization. To remedy these shortcomings, METRO asked KSA to develop and implement procedures to uncover and eliminate redundant initiatives, to focus resources, and create company-wide visibility in terms of initiatives and budget. This was labeled “Implementation of Advanced Retailing.” Parallel to that, a vision and mission statement for the strategic direction of the supply chain was to be developed.

Heiner Spalink, Wolf Wagner, and Giovanni Pozzoli spent six months on-site to work on this project. In a marathon of interviews, data on external committees and internal projects was collected, analyzed, and consolidated in a database. Approximately 100 initiatives were screened, providing METRO with a company-wide overview for the first time.

With the newly-minted vision and mission statement developed by KSA’s Heiner Spalink, Jean-Louis Simoneau, and David Oliver with input from the METRO Group board, business cases and numeric evaluation models were introduced to the client and immediately put into practice.

KSA’s expertise has proven to be of utmost importance in this project. Not only were the tools new to most of the client’s staff, but the very concept of creating a cross-section view of the whole company was unheard of. Heiner, Wolf and Giovanni managed to build a high acceptance level due to an open communication style, ECR and supply chain management knowledge, and the application of multi-project management best practices.

The success of the project has yielded KSA the unofficial status of a “trusted advisor.” So much so that KSA and METRO co-sponsored the ECR-award in Vienna last September, with Heiner delivering key speeches. Additionally, the term “Advanced Retailing,” which was originally cast by KSA for this project, has now found its way into METRO’s next annual report.

KSA recommended that METRO take a step back and look at the big picture in terms of supply chain optimisation, customer and supplier collaboration, and the use of technology.

It comes as no surprise that KSA has maintained its fully-equipped office on METRO’s premises even after the official completion of the Advanced Retailing project. Don’t expect the office to stay vacant for long, though. KSA is already working on a concept for the complete overhaul of the supply chain, the motto being “Supply Chain of the Future.”

A “SAGE” Approach at CMF (Continued from Page 3)

By Gretchen Koch

In fact, by recognizing its broader competitive set, including Lipitor® in the cholesterol reduction segment, Cheerios was able to ensure brand relevance and maintain authenticity.

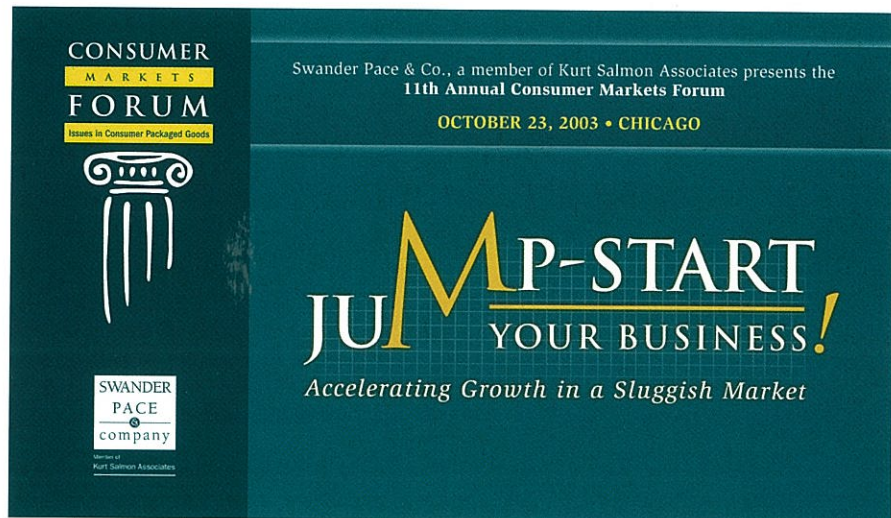
Competitive attrition: Trojan condoms. Trojan marketing executives’ two key product goals were to normalize condom usage and create a personal relationship between the brand and its consumer. “We want our customers to think of condoms like seat belts,” Vice President of Marketing Richard Kline explained. So, the advertising team created humorous TV and radio spots in which superhero, Trojan Man, interrupts romantic situations with a serious condom message. This humorous approach not only helped couples discuss a sensitive topic, but added an “ownable” persona to the brand.

Commercialization: Pop Secret microwave popcorn. In 1984, the General Mills new product team realized the microwave would be the next toaster. Nancy Hedrick, a product manager at General Mills at the time explained how the team extensively researched products targeting microwaves. Its vision was to become a leader in microwave popcorn. Through a licensing agreement with Golden Valley Microwave Popcorn, General Mills was able to commercialize Golden Valley’s proprietary technology, a susceptor heater plate that resulted in far less unpopped kernels, to propel Pop Secret to realize its vision.

Expanding boundaries: Venus female shaving system. In developing a wet shaving product for a woman, Gillette knew it needed to connect with women on an emotional

level. Using consumer insights, it transformed female shaving from commodity to beauty to redefine the

products, we think about selling Swiffer,” said Swiffer brand manager Maurice Coffey.



female shaving market. The development team designed a shower organizer to store razor blades in the shower so women could easily find them when they needed them. The Venus shaving system’s marketing approach was to make every woman feel like a goddess.

Pioneering: Swiffer. Of Procter & Gamble’s 300 brands, Swiffer has become No. 14 in just four years and created an entirely new product category: quick clean.

To continue growing sales and maintain its strong margins, Swiffer wrestled with how to establish a power brand rooted in high performance while simultaneously developing an emotional bond with consumers.

Consumer research has revealed that using Swiffer products is fun and P&G has leveraged the fun element throughout its advertising. “While our competitors think of selling cleaning

At the conclusion of the forum, Sterry pointed out that to even have a chance to achieve strong growth in such a mature industry, organizations must be able to identify growth opportunities. To be a true pioneer, the organization must be entrepreneurial in spirit and not be afraid to take a calculated risk, to be willing to break with conventional wisdom. Expanding the boundaries depends on world-class market research to determine where and how to push the boundaries of a category. Companies that are successful at commercialization have a private equity mindset, constantly monitoring the environment for emerging ideas and companies and moving quickly into opportunities as appropriate.

Finally, in competitive attrition, the leader has an instinctive sense for the competitor’s weaknesses and how to capitalize on those weaknesses.

Casablanca: KSAT in Morocco

By Ravi Vaidyanathan



Pictured top: Buying olives in the Olive Market; Bottom: Vendors in the Hoobus Market

Casablanca. The name sounds magical, a mixture of many worlds and origins. It smells Arabic, Berber, African but also occidental. As part of Northern Africa, bordering the North Atlantic Ocean and the Mediterranean Sea, it was a revelation to find Casablanca is a city that keeps a good part of its tradition in sync with the modern Morocco, unlike that represented in its movie namesake.

As part of our new apparel factory start-up project in Senegal, Tautik Das and I traveled 14 hours to Morocco to recruit French-speaking factory middle management to become members of the project team. We were joined by the Malaysia-based client CFO.

We began our stay in Northern Africa without our luggage, which was stuck in Dubai. Upon our arrival, with no clothing in tow, we decided to head directly to work, then waited for dusk to shop for essentials.

We shopped at Hoobus (Casa's market place) and visited the famous Olive Market (pictured above) where tons of olives are for sale. The "mother of all market places," one can buy all kinds of goods — from belts, artifacts, paintings, lights, clothes, food, even monuments. During our journey, we also witnessed a Moroccan wedding.

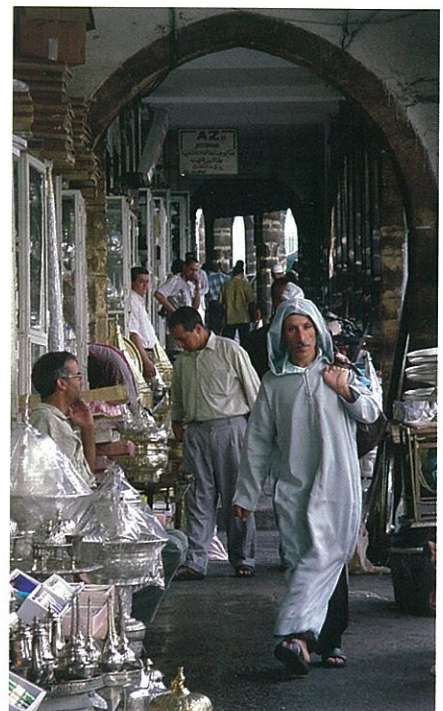
Recruiting for the Senegal plant went well. The interviews were conducted at one of the main textile and apparel institutes in Morocco. Institute directors showed us around the institute, the Association Marocaine des Industries du textile et de l'habillement (AMITH), which wants to work with KSA to improve its industry.

By the end of day three, our bags had arrived and we were off to our next exotic location, Senegal. While in Morocco, we had learned some French words that proved helpful to

us at our project site in Senegal, located in Western Africa.

Despite having no luggage for three days, my experience of the rich culture in Africa was very gratifying. It was an adventure that I will soon not forget.

"...it was a revelation to find Casablanca is a city which keeps a good part of its tradition in sync with the modern Morocco, unlike that represented in its movie namesake."



Blackout 2003: The Long Journey Home

By Gary Wong

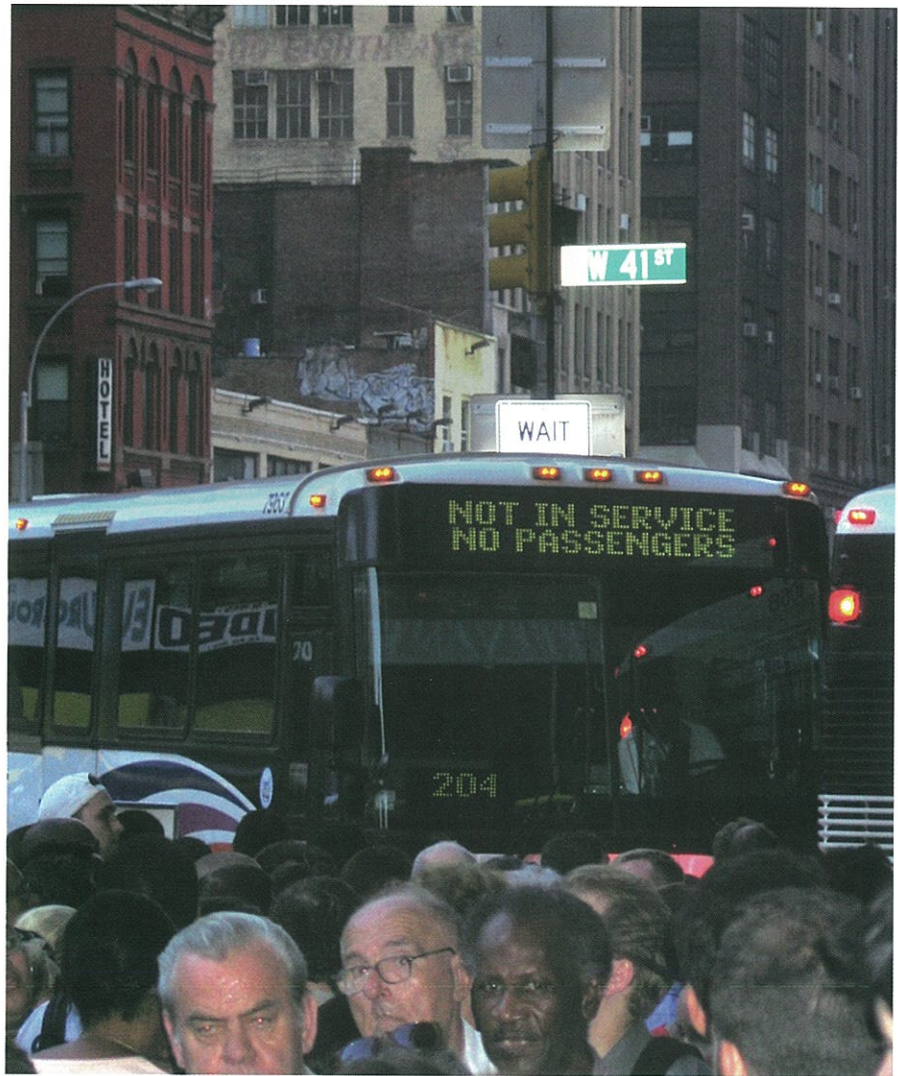
I've never left work early with the entire city of New York and made it home at midnight. But on August 14, 2003, the day New York City's power failed, that is exactly what happened.

On that seemingly normal Thursday, I was working on projects in the New York Office, when suddenly the room went dark — and stayed dark. After waiting several long minutes, I realized that lights, phones, and electricity were probably not going to come on again any time soon. So I began my descent down 38 flights of stairs, out to the Manhattan street where a growing number of New York office workers soon joined me, and then ventured towards the bus terminal to find the bus that would take me home.

Imagine the disappointment of having to trek down several flights of stairs to the Port Authority bus terminal only to find it shut down! Stranded with hundreds of other tired New Yorkers, it's times like these when you realize how much we depend on our cell phones!

I finally decided to walk around the building with another person and we happened upon the street where people were boarding several buses. It turned out that they decided to run all buses to Meadowlands/Giant Stadium and then I could board a connecting bus home. Would you believe I got the last seat on the bus?

After arriving at the Meadowlands, I prepared for my second adventure — finding a connecting bus among a sea of parked buses. After a great deal of searching, I finally found a bus that would take me close enough to where my girlfriend, Jeanne, could pick me



Mass exodus of people in Bryant Park, overlooking the Empire State Building, during Blackout 2003

up. But this time, I had to stand for the hour ride. I was excited, though, to finally be heading home.

Around midnight, I got a call from my sister, who also works in the city. She had also walked to the Port Authority with her boss, then from 42nd Street to 180th Street, where her boss' grandmother lives, rested for a while, and then proceeded over the George

Washington Bridge to New Jersey where her husband picked her up. I was amazed that she walked 140 blocks wearing only beach sandals!

Needless to say, I can speak for my sister, fellow KSAers, the city of New York, and myself when I say that it never felt better to arrive home!

Escape from Alcatraz' Sharkfest

By Tanny Petchor

"Fins to the left, fins to the right." Those were the Jimmy Buffet lyrics going through my head as I rode the Blue and Gold Line Ferry out to Alcatraz Island, or "The Rock," off the coast of San Francisco. After all, this was deemed "the Alcatraz Sharkfest," a 1.5-mile swim from Alcatraz Island to San Francisco Aquatic Park. This is the swim the Anglin Brothers and Frank Lee Morris attempted in their successful escape from Alcatraz on the night of June 12, 1962. And it was the swim that I was about to attempt.

The fog was just lifting off the Golden Gate Bridge as we milled around the beach waiting to board the ferry. The majority of swimmers were wetsuit-clad, recommended for the 50-degree

hot chocolate. By the time I finished drinking it, we were ready to board the ferry.

The pier next to the Alcatraz ferry pier has been taken over by sea lions, which were our primary cheering section, clapping and honking as we boarded the two ferries that would take us out to Alcatraz. The majority of the spectators were waiting inside the park at the finish line.

The ride out to Alcatraz was eerily quiet as everyone huddled inside for warmth. I watched the water for any signs of rough current or sharks. But the lone Coke can bobbing up and down reaffirmed that I was still in striking distance of civilization.

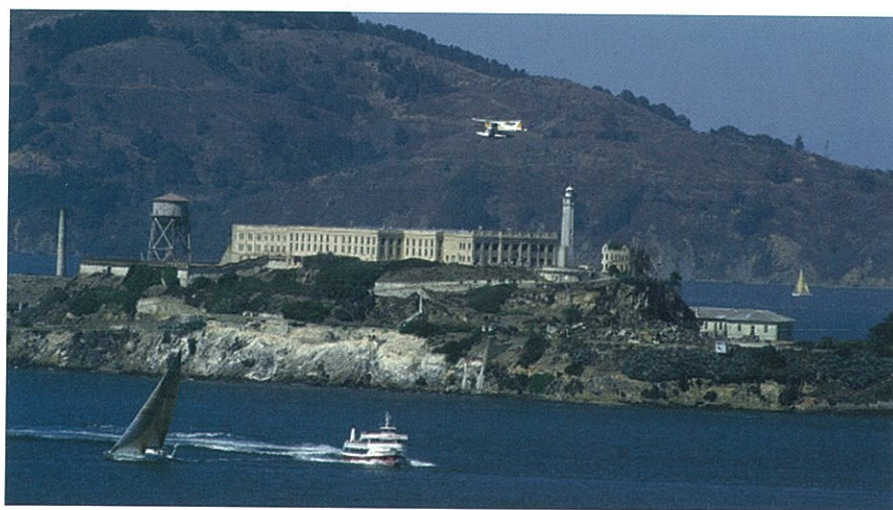
rolling sea water, which tasted of a salty mixture of brine and diesel. While concentrating on overcoming the shock of the cold, I struggled to get the right muscles to work in unison.

The majority of the swimmers were wetsuit-clad, recommended for the 50-degree water temperature. There were also about 40 people wearing regular swimsuits, a group wearing black-and-white striped prison uniforms, as well as a cross-dresser wearing a dress.

There was a strong ebb tide running parallel to the shore, pushing us out toward the Golden Gate Bridge. To get to the finish line on the beach, we had to aim several hundred yards left of it. There was a boat with large orange balloons, indicating our course to follow. Veer too far to the right and you'd be swept out to sea.

Just under an hour later, I reached the seawall protecting the cove, and swam the last 150 yards to the finish line. I darted onto the beach to cross the orange timing mat, which read: 1:03:54.

The beach had transformed into a party and was packed with spectators cheering for us, including a couple of KSAers. During the party, I was cold and my body ached. But nothing could wipe the grin off my face. After all, I had made it. I had escaped "The Rock."



The view from the Ferry during the "Escape from Alcatraz" race in California.

water temperature. There were also about 40 people wearing regular swimsuits, a group wearing black-and-white striped prison uniforms over their wetsuits, as well as a cross-dresser wearing a dress. The majority of the people were warming up for the race along the pier. As a newcomer, my warm-up consisted of a cup of free

We donned our goggles and swim caps. With my heart racing, I queued up for the 10-foot jump into the water. The second horn sounded, the gates on the ferry opened, and the referee cried, "Into the water!"

I scrambled to the surface the moment I hit, swallowing mouthfuls of the

European Staff Meeting Focus: 2007

by Claire Simoneau

At the peak of Fall 2003, the objective for the European Staff meeting was to find a warm, sunny location in which to welcome 130 European KSAers and their guests. Thanks to the fantastic efforts of the Organisation Team, this objective was achieved and this year's European Staff Meeting was held at the Caribe Resort of Salou, an hour's drive south of Barcelona and a 10-minute walk from the sea. Over two very full days, our time was divided among presentations, workshops, and team activities.

The first day started with an optional jogging programme dedicated to KSA's early birds and then meetings and presentations began. David Oliver welcomed us and introduced colleagues from India, in addition to Bill Pace and Peter Brown and guests from our partners, Apar and Diagma. David introduced our three guest speakers: Tamar Kasriel from the Henley Centre, Ronald van Zanten from Cisco Systems, and Dr. Wolfram from METRO.

The first part of the morning focused on Strategic Perspectives, as we heard presentations by Jean-Louis Simeoneau and Bill Pace on KSA's progress in 2003 and their vision for the future leading up to 2007.

These presentations were followed by contributions from our guest speakers focusing on future trends in retailing from the consumer, retailer, and solution provider perspectives.

The final guest speaker was Dr. Wolfram, from KSA's German partner METRO, who presented an overview and the first results of the "Future Store



The European staff stands in front of their colorful hand-made KSA banner.

Initiative," including information on the first store, which opened in Rheinberg in April 2003.

We were organised into 15 workshops and enjoyed lively discussions about the questions: "What are the two most important trends and how will they impact KSA and our clients?"

Later, we all enjoyed tapas and drinks on the poolside terrace before moving to the Gala Dinner. During the evening, Peter Brown was recognised for his extraordinary 25-year commitment to KSA and Patrick Moylan was recognised for his 20-year contribution to the success of KSA UK.

The next morning, Peter Brown opened with a presentation on "The Changing Management Consultancy Market." This was followed by a presentation on Technology Deployment by Bertrand Jauffret. Kirsten Focken, European Marketing Director, outlined KSA's European Marketing Strategy.

Bill Pace and Jean-Louis Simoneau drew the business of the day to a close and

handed the presentation over to Bagar Naqvi from KSA Technopak, who introduced the afternoon programme.

Inspired by staff from Technopak, KSA decided to contribute to the Balwadi Project, an Indian charity, which offers nursery care to some of India's poorest children. The entire afternoon was dedicated to team events and challenges that benefitted the charity.

Each team wore brightly coloured team shirts and had to complete 10 tasks. These activities called for skills: physical strength, precision, or artistic flair.

As a result of points awarded for each activity, KSA has pledged an amazing 518,320 Indian Roupees (9,900 Euros), which will fund a year's attendance for 140 pre-school children.

This gathering in Salou emphasised KSA's core values and was a valuable opportunity for KSAers across Europe to get to know each other. These two days of working together and exchanging ideas have enthused and inspired all of us as we work toward 2007.

KSA Alumni News

Edited by Joe Scheines

Though the recap of KSA alumni who passed away in 2003 is thankfully shorter than last year's, the passing of the following three people is significant to us all. They will each be missed.

John Cohen

John Cohen was a mainstay of KSA's tailored clothing practice back in the 60s and 70s. He came to us from Australia by way of England, where he had studied men's tailored clothing and made suits. He settled in Montreal and served many clients from our office there. When he left KSA, he remained in Montreal and continued to work as a consultant in the industry. He died of cardiac arrest in June,

2003, survived by his companion and caregiver of 30 years, Lois Manton.

Dick Bath

Dick Bath became legendary during the decade or so that he spent with KSA. He appeared intimidating because of his size (6-feet 5-inches), and his military bearing (he had been a member of the Special Forces in Vietnam), but he was actually a pleasant fellow — until aroused. He once single-handedly fought off a quartet of knife-wielding muggers while on his way to the New York office. After he left KSA in the late 70s, Dick and his wife, Barbara, set up a highly successful women's wear contract operation in Missouri. It was still doing well in

March 2003 when Dick was killed while attempting to land his single-engine plane in heavy fog at the Milledgeville, Georgia, airport. He was 65 years old.

Susan Vought

Susan Vought lost her long fight against breast cancer in February 2003. She was very much a part of the KSA family. Susan was the wife of Dean Vought, who was a member of the second generation of management that led KSA after Kurt Salmon retired in the 70s. She was also the mother of five daughters, including Amanda (Vought) Abrahm, who did Strategy and Marketing assignments for us in the mid-90s.

Tom Austin

It's been a long time ('67-'77) since I worked for KSA. Some readers may not have been born when I started my training in Kurt's Washington, D.C., basement, and then moved to Peachtree Street in Atlanta. Julie and I, along with two sons, moved nine times before finally settling in Roswell, GA in 1973.

Since leaving KSA, we've continued to move around the country, although not as frequently. First it was to Portland, OR and White Stag as Director of Engineering, then, back to Atlanta as VP Manufacturing for Personal Sportswear.

We moved to Roanoke, VA, then to Greensboro, NC where I joined Vanity Fair (VF) Corporation as Senior VP of Manufacturing and Operations at Healthtex. We moved to Grand Rapids, MI in 1995 (a move that cost



KSA Alumni got together when the infamous "Bridge Group" visited Hilton Head in February, 2003. (Top row, L-R) Lee & Terry Ozley; Jan & Bill Cobb; Randy Nord; John Caldwell; Diane & Tony DeMaria; Rita Scheines; Ken & Vivian Osborne; Cat Turbyfill; Kline Reed; JoAnn Caldwell; Jeanne and Josh Taylor. (Bottom, L-R) Betty Nord; Gerry Turbyfill; Bill Reed; Judy Faust & Chuck Harris; Carole & Fernando Silva; Joe Scheines.

me a full-length mink coat), where I took over as President of HH Cutler Co.

After merging Cutler and Healthtex in 1998, and moving back to Greensboro, I started a "short-term" assignment for VF at Bestform

Intimates in New York. Moving was now over for us, and I commuted from Greensboro to LaGuardia for four years. In October 2002, having

(Continued on next page)

KSA Alumni News (continued)

helped merge Bestform and Vanity Fair (VF), I worked myself out of a job and left VF on friendly terms.

2003 was interesting, to say the least. We started off with a trip to Italy, our first two-week vacation in 10 years. By the end of July we had decided on a new job, and scheduled a week at the beach before I returned to my commute to New York. One day into the vacation, I misjudged a wave while body-surfing, and ended up paralyzed with a spinal cord injury.

The paralysis was relatively short term and, due to the grace of God, good doctors, and the thoughts and prayers of many friends, I am recovering. I don't know if I'll be able to do all the things I once did, but I can do all the things I need to do. In November I joined Kellwood as President of the Operations Services Division. I'm based in New York, and commuting from Greensboro, where I hope to resume my weekly golf game with Jerry Armfield shortly.

Deborah Hannah

After leaving KSA, I completed the one-year MBA program at Emory (Goizueta Business School), with a concentration in Marketing. I'm now working in the customer marketing group for Kimberly-Clark in Neenah, Wisconsin. I have two main responsibilities: volume planning for the Kotex, Depends, and Poise brands, and also executing displays and special pack consumer promotions. Steve and I bought an old "character" house that takes up a lot of our time when we're not working. We're looking forward to our first real winter in the north.



Joe Irastorza and his wife, Berta, overlooking the Sognefjord in Norway

Joe Irastorza

I retired in July 2000 and highly recommend it. The transition was very smooth. My work hours at KSA were reduced gradually; it took more than two years to get them down to an insignificant amount. In preparation for retirement, I bought more than 150 books in the year leading up to the big day.

We bought a condo in St. Augustine beach (Florida) almost 20 years ago, but I never had time to stay there more than a couple of weeks per year. The last two years have been different and we have spent a lot of time there.

In addition, Berta and I love to travel. Since retiring we have taken a river cruise from Cologne to Budapest, spent a week in Napa and Sonoma (twice), visited the wine regions of Rioja, Ribera del Duero, and Bordeaux, as well as the castles in the

Loire Valley, visited the main cities in Eastern Canada, made a round of the National Parks in the West, gone on a Panama Canal cruise, toured the Norwegian fjords and the main cities in the Baltic, and finally spent three weeks on the Mediterranean and Atlantic coasts of Spain and Portugal.

I have also enjoyed working around the house with the main projects being a wine cellar, entertainment room, exercise room, plus some remodeling at the condo and at my son's house.

My daughter, after years raising two boys, decided to go back to work and start a business. She enlisted my help in developing the business plan and establishing the administrative procedures, as well as the accounting and computer systems. Other activities

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KSA Alumni News (continued)

include being a Board member at St. Ives, playing a little golf, and tutoring a grandson in high school.

Bottom line: I still need to prepare a to-do list (which is never empty), and if you are wondering about those 150 books I bought, I have only found time to read a dozen so far.

Dave Perdue



Next year, it will be 20 years since I left KSA! Wow, time really does race on, doesn't it? Seriously, I have always told people that the best job I ever had was with KSA; the disciplines I learned there still serve me well today.

Before updating you on what I am doing now, let me fill you in on our family, the part of my life of which I am most proud. Bonnie and I celebrated our 30th wedding anniversary last year. David III, 26, after graduating from Vanderbilt and spending three years with AT&T, is in graduate business school at Darden. Blake, 24, having also graduated from Vanderbilt, is

in Dallas starting up his own software company and having a ball. Bonnie and I now reside in Nashville.

In my current role as Chairman/CEO of Dollar General (DG), I rely heavily on my KSA training. KSA was and is focused on results, not process. Here at DG, while I would not call it a turnaround, we have some work to do to catch up with our recent rapid growth. We have more than 6,500 stores and open two new ones every day! We are growing rapidly and it is a very exciting, fast-paced place to be.

My favorite KSA story occurred when I was on my second assignment. At that time, we were regularly reminded (by Kurt and others) to mail in our billing instructions (BIs) and weekly reports before we took our britches off on Friday night. In one of these weekly four-copy reports, I included that the following week I would be attending a seminar in Washington, DC. The next week, I received a call from Kurt, who said he had read in my report that I would be in town and he wanted to have dinner with me. Needless to say, I was blown away. The fact that Kurt Salmon read every report — that the boss knew and cared about what I was doing—spoke volumes to me then and I have never forgotten it. It was quite an impressionable lesson. This concern for individuals and attention to detail is, in my opinion, what KSA is all about.

If you are ever in Nashville, look me up.

Dean Sivara

Since leaving KSA in January 2001, the Sivara family has been on a global

whirlwind tour. We moved to Paris, France, in June 2001 after taking a job with Cisco Systems.

I received a call from Kurt [Salmon], who said he had read in my report that I would be in town and he wanted to have dinner with me...I was blown away. The fact that Kurt Salmon read every report — that the boss knew and cared about what I was doing — spoke volumes to me then, and I have never forgotten it.

During our two years in Europe, we traveled to 20 different countries with the kids, including South Africa, Czech Republic, Sweden, and Ireland. Our favorite destinations were Prague, Tuscany, Provence, and Spain. It was a wonderful experience for the entire family. The kids and Lisa were able to become partially fluent in French, while I was a hopeless case, learning only one word per quarter.

We moved back to the United States last August, settling in Menlo Park, California, near Cisco's headquarters in San Jose. We are now enjoying American food, football, and golf.

New Chair Man at KSA

By James Bourne

Ask any Madison, Wisconsin KSAer or client to recount one of their favorite local hotspots, and they will always mention visiting The Terrace, a magnificent, five-level convention center sitting on Lake Monona, in Madison, Wisconsin. Inspired by world-renowned architect Frank Lloyd Wright, during the warm weather months, The Terrace is a local's — and tourist's — favorite place to hear live music, learn to sail, or just relax with a good book and great amber ale. It is quintessential Madison.

As the Wisconsin Union of Madison celebrates its 75th anniversary this year, artists were commissioned to decorate oversized versions of the iconic metal chairs that dot the patio of the Terrace.

With encouragement from HSD Vice President, Meredith Spear, and brimming with nervous energy, I submitted my proposal—the first I've ever done for an art show. My idea was a last minute inspiration. I worked until the early morning hours the night

before the deadline, scanning and rendering my drawing in Photoshop, writing and re-writing my description and artist's statement, and then, finally dropped off my packet the next day at lunch.

More than 100 submissions were received from artists and alumni, and on a Friday afternoon I got the call that my design was selected as one of 12 to be commissioned and displayed around the city during the 2003-2004 school year!

My idea was based on a decade of enjoying the blissful atmosphere of the Terrace. I've seen great concerts there, made good friends there, and it is the primary after-work gathering spot for the KSA Madison office. For that reason, I wanted to wrap all those experiences up and funnel them into the design. So using the round sunburst shapes that the chair itself incorporates, I designed a figure, relaxing, reading a book, with a guitar leaning against the chair. I tried to use the sunburst icon as many times as possible,



Top: James Bourne stands beside his creation;

Bottom left: The Terrace in Madison

while still leaving one distinct shape, the guitar, as a counterpoint to all the sunbursts.

Once I got the call, I thought to myself, "Great idea, James, now how do you execute it?" At first, I considered doing the metal cutting and welding myself or enlisting some of my more experienced friends. In the end, I collaborated with a local metal shop that does custom fabrication.

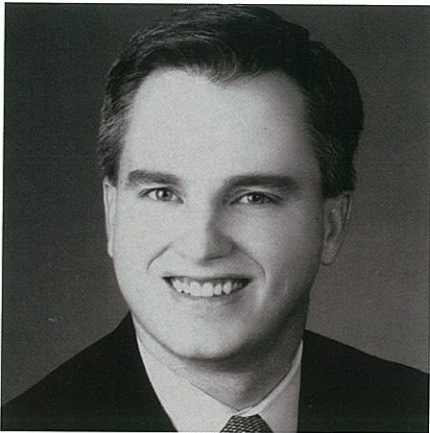
Looking back, creating the chair, seeing the finished piece, being at the art opening, and just being able to tell myself that I've had a public piece of art commissioned has been extremely rewarding and a creative boost to my work at KSA as well.



Manager Promotions

By Bill Pace

Sherman Moore

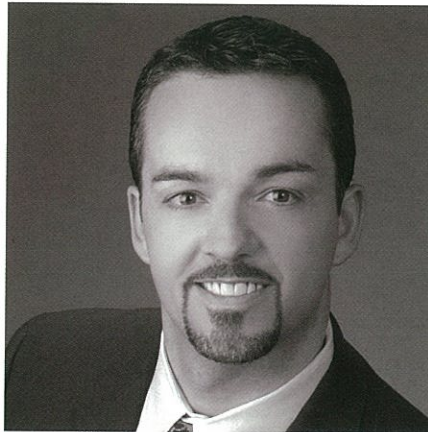


We are pleased to announce the promotion of Sherman Moore to Manager in the Health Care Strategy Group of KSA. Sherman began his career with KSA in the fall of 1999 in the Minneapolis office, coming to KSA from Henry Ford Health System. Sherman is an excellent consultant with significant competencies in both strategy and facility planning engagements. In addition to consistently delivering very high quality project work, Sherman has excelled in creating long-term relationships with clients. Several of the individuals he has developed personal relationships with have called him unsolicited for work at their new organizations. Examples of key clients and engagements include:

- **Methodist Health Care System, Houston, TX** Project manager for over \$1.5M of facilities and strategy work. Personally led a sales team for a \$500,000 sale based on his personal relationships with hospital CEOs.
- **Virtua, Marlton, NJ** Assisted in the development of a clinical program development strategy across four hospital system.
- **Alegent Health, Omaha, NE** Managed key portions of the facility planning across three hospital campuses.
- **Mayo Health System, Eau Claire, WI** Led the strategic planning process for their northern region.
- In 2002, Sherman and his family relocated from Minneapolis to Atlanta. Sherman and his wife, Jennifer, have three children and live in a western suburb of Atlanta. He is active in church activities and enjoys spending time with his family and golf.

Please join me in congratulating Sherman on this important recognition!

Paul Murphy



We are pleased to announce the promotion of Paul Murphy to Manager in the Health Care Information Technology Group of KSA. Over the past five years, Paul has exhibited significant expertise and competence in all aspects of health care information technology projects. He has been involved in strategic planning, vendor selection, contract negotiation, and implementation projects. These engagements have been in diverse client settings including:

- **Strategic Planning:** Louisiana State University (LSU), Prairie Lakes, Henry Medical Center, North Memorial Health Care, Wellstar.
- **System Selection:** Operating Room System at HealthEast Care System; Pharmacy System at LA County; Laboratory, Pathology and Blood Bank Systems at Henry Medical Center; Hospital Information System at Prairie Lakes; Clinical Information System at Regions Hospital, and both Clinical and Revenue Cycle Systems at North Memorial Health Care.
- **Contract Negotiations:** LSU, Wellstar, Henry Medical Center, Prairie Lakes.
- **Implementation Project Management:** Radiology, Laboratory, Pathology, and Blood Bank Systems at Henry Medical Center.

Clients with whom Paul has created strong relationships and achieved add-on work include the following: Henry Medical Center, LA County, Riverside County Regional Medical Center, Prairie Lakes, Santa Clara County, and North Memorial Health Care.

Paul has also developed significant expertise in pharmacy automation and electronic health records, which has significant value for our ongoing client engagements.

Paul's spare time is spent working on and decorating his new home with his partner, John, and trying to keep his two cats from clawing the fruits of his labor.

(Continued on next page)

Weddings and Births

David Hetzel



With great pleasure, I'd like to welcome our new Chief Administrative Officer at KSA, David B. Hetzel.

After an exhaustive search, we have found a great successor to Bob Galvin. Dave will be based in the Atlanta office.

Dave has had several senior administrative management positions at Arthur Andersen over the past 25 years. Most notably, he has been very effective in his roles of Chief Operating Officer and Director of Finance for two of Andersen's major regions in the United States. The interviews conducted by a number of KSAers, as well as the references from Dave's associates at Andersen and elsewhere, were uniformly and exceedingly positive. Not only is Dave highly qualified for the CAO position, he's a perfect fit with KSA.

Originally from New Jersey, Dave has two children, Morgan, 17, and James, 26. He enjoys sports, theater, and umpiring Little League Baseball (most notably umpiring the Little League World Series in 1994).

Again, please join me in welcoming Dave to KSA!

Newlyweds:

- **Katherine Lackovic (NY)** and Nicholas Lombardo, October 18 (pictured below).
- **JuJuan Timberlake (LA)** and Angela Adams, May 23.
- **Enrique Morales (LA)** and Megan Reese, September 6.



Births:

- Congratulations to **Amy Klaris (NY)** and Josh who had twins, Eloise May and Gabriel Cooper, born October 8.
- Best wishes to **Gary Catherman (AO)** and Margaret, who had a baby boy, John Thomas, on August 23.
- **Troy Conover (NY)** and Susan welcomed a new daughter, Ella, to the world on November 4.
- **Sören Ick (Germany)** and Sofia had their son, Luka Ick Santa Cruz, on August 22.
- **Sean Ryan (LA)** and his wife, Jessica, who welcomed their daughter, Katherine Grace, on December 13.
- **JuJuan Timberlake (LA)** and Angela, welcomed a baby boy, Jalin, Thanksgiving Day (November 27).
- **Wolfgang Wanning (Germany)** and his wife, Marita, gave birth to their son, Vincent Bernhard Wanning, on August 12.

KSA's 128th Orientation

This year, the 128th KSA Orientation was held at one of KSA's offices in Atlanta, Georgia. Nearly 70 KSAers attended the week-long training programs hosted by Chuck Easley, Pam Beckerman, and Libby Morgan. At the end of the week, participants were asked to divide up into teams of 10 and create a presentation based on their learnings throughout the week. The teams performed skits, songs, and even poems. This is one such poem performed by one of the orientation groups.

"Twas the Week of Orientation (Parody of "Twas the Night Before Christmas")

'Twas the week of Orientation at the Residence Inn, KSAers were arriving, anticipating the week to begin. Libby was greeting the consultants as they came, we were impressed by her warmth, as she learned all 64 names.

We consultants were rested after a night in our beds, while visions of the week danced in our heads. With nametags 'round our necks and much beer on tap, we all accepted this week without taking a nap.

In came Bruce Seeber, late to the room, a rendition of Georgia Tech's Fight Song, he gave with a boom. We learned all about KSA: Who, what, when, and where, "And what about Paris? Yes, there IS an office there!"

When what to our wondering eyes should appear, but mighty Chuck Easley with a speech about beer! Outward Bound was the event of the day, we met with our group and Jeff showed us the way.



"Now, Kroger! Now, Borders! Now, Staples and Rich's-Macys! On Bloomies! On Target! On Publix and Circuit City! Out in Atlanta! And on to Lenox Mall! Now, Dash Away! Dash away! Dash away, all!"

We took on our assignment, all in good stride, we figured out MARTA, or just caught a ride. So on to their respective stores, the consultants they flew, to analyze the supply chains, with Tinker Toys, too!

Randy Unger came in to talk about change, how we'd adjust and how our emotions would range. Pam Beckerman discussed the work situations not to create, did you know you could marry, but just not date?

No groping, no grabbing, no sexual jokes, after some beers, that last one was broke... out on the town we knew we would be consuming pitchers of "Long Island Iced Tea."

With squinting eyes and a queasy belly, we head to the Hearth Room for a bagel and jelly. Each morning was filled with droopy-eyed faces, believed to be from the alcohol traces.

The dinner at Ansley was really quite great, then we headed to Buckhead for a night out late. Libby deserves thanks the most, for planning the event and being a fabulous host.

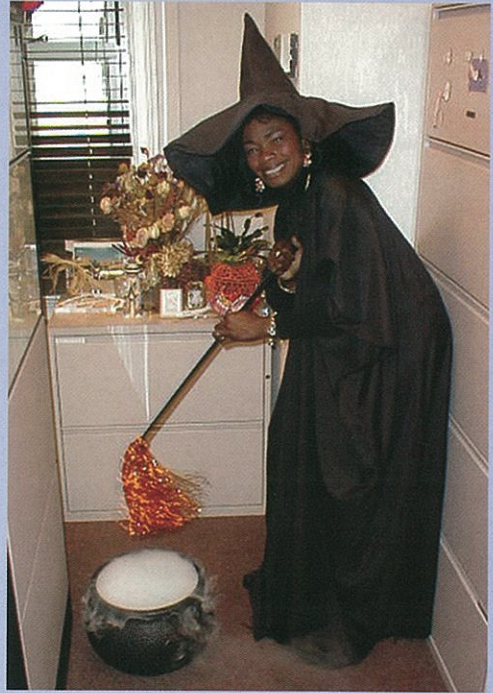
We learned so much during 2003 Orientation, including how to count "F's" and how to have fun. We'll spring to the airport and go our separate ways, while the memories remain of these last six days.

Meeting everyone was such a delight, Happy orientation to all! And to all a good flight!

KSA Candid



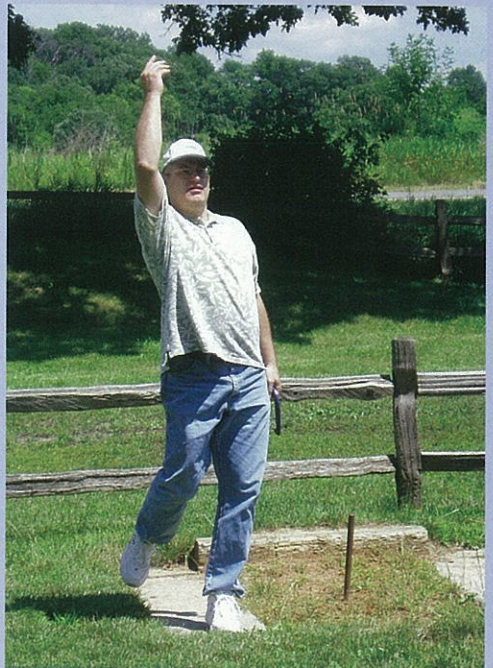
Kevin Knight, Raquel Short, and Carol Farmer visit Orientation in costume during the Fall Festival Party in the Atlanta office.



Mona Clifton brews fun in Atlanta during the party.



The Minneapolis group finds shade on a sunny day at the Minneapolis HSD picnic.



Larry Sterle tosses horseshoes at the picnic.



Another KSA thrill-seeker, Marcos Corminos, dives with the sharks in Honduras.

KSA APC: Fun in Fuji

By Todd Soller

What do you get when you take 39 consultants from seven KSA offices across the world and place them together for a weekend on a beautiful lake with a world-famous mountain during the season's first snow? The 2003 KSA Asia Pacific Conference (APC), of course.

In late October, we gathered in Hakone, Japan to renew current relationships, grow new ones, update each other on the state of both KSA Worldwide and Asia Pacific, and as always, to have fun.

The trek to the 2003 APC started in Hong Kong early in the morning of Friday, October 17, when the Hong Kong office members flew to Tokyo. Joining the Aeon team members in Makuhari (outside Tokyo), we boarded a bus and began the journey into the heart of Tokyo. World politics did not cooperate, as George W. Bush's visit to Tokyo shut down the governmental sections of Tokyo and snarled traffic for many kilometers. Finally making our way into the Akasaka area of Tokyo, we picked up our final members at the KSA office. For all practical purposes, the 2003 KSA APC had begun.

As the bus approached the foothills surrounding Mt. Fuji, we began to wind through the mountain roads that signaled our arrival at the Hakone Prince Hotel. Even a late dinner didn't prevent several KSAers from taking advantage of the rotemburo (an outdoor hot spring bath) that night.

Early the next morning, the working session kicked off with opening words from Managing Director for Asia

Pacific, Glenn Hershey, followed by a KSA Worldwide presentation from our CEO, Bill Pace, and the head of the Global Leadership Team efforts, Jerry Black. Glenn addressed the status of KSA AP in 2003 and the upcoming goals for KSA AP in 2004 and beyond.

Project updates from Adidas, Aeon, Hakata Daimaru, Koikeya, KSA Sourcing Roundtable, Maxxium, Shinsei Bank, and Shiseido highlighted the excellent results being delivered by the Hong Kong and Tokyo offices. A working session on increasing collaboration and information sharing focused on increasing KSA's ability to leverage knowledge across offices, practices, and continents. With KSA CPD members from Asia Pacific, Europe, and North America present, it was an especially relevant topic, helping to ensure that we continue to use our worldwide resources in the future.

Saturday night brought traditional Japanese dining, but no tatami mats, which was a blessing for some of us whose knees do not bend so well. Dinner entertainment was headed by Tiger Ichiyama, with prizes for contest winners consisting of KSA's clients' products. After dinner, KSAers continued to catch up with each other.

Sunday would normally be a rest day, with people heading home, but not for the KSA APC. The day was filled with golf (with no sunscreen), sightseeing, hiking along Ashi-no-ko, riding the ropeways to the volcanic vents at Owaku-dani, and more. Even as we



Two very different views of Fuji: Volcanic vents of Awaku-Dani and the peaceful waters of Ashi-no-ko.



finally left Hakone late Sunday afternoon, the bus continued to be lively, recounting the events of the weekend and looking forward to the next APC.