



Going from entrepreneur to CEO is a must for privately held, small to mid-sized companies who want substantial growth. It takes systems, structure and the right people doing the right things. It also takes the dedication and flexibility of a true leader who is effective and confident at building and allowing their team to soar.



### Company – Kelly S Mathews LLC

Kelly S Mathews LLC ("KSMLLC") was founded in 2003 by Kelly Mathews. Prior to founding the firm, Kelly Mathews began her career in 1994 with a Big Four Accounting Firm. Kelly's work with the Firm centered primarily on the motor fuels tax outsourcing practice. During this time, Kelly was exposed to the federal excise tax quarterly return and related deposits and motor fuels tax returns in all 50 states.

After four years, Kelly was recruited to another Big Four Accounting Firm to start their motor fuels tax practice from the ground up. Kelly remained at this Firm for over four years working exclusively in the motor fuels tax practice area.

In 2003, Kelly founded KSMLLC and works exclusively with clients in the oil and gas industry, specifically, clients in the refining and marketing industry, including refiners, traders, and terminal/pipeline operators, and clients in the natural gas industry who operate fractionation plants.

KSMLLC started with one employee, Ms. Mathews, and grew steadily over the next 10 years to a multi million dollar company with 14 employees.

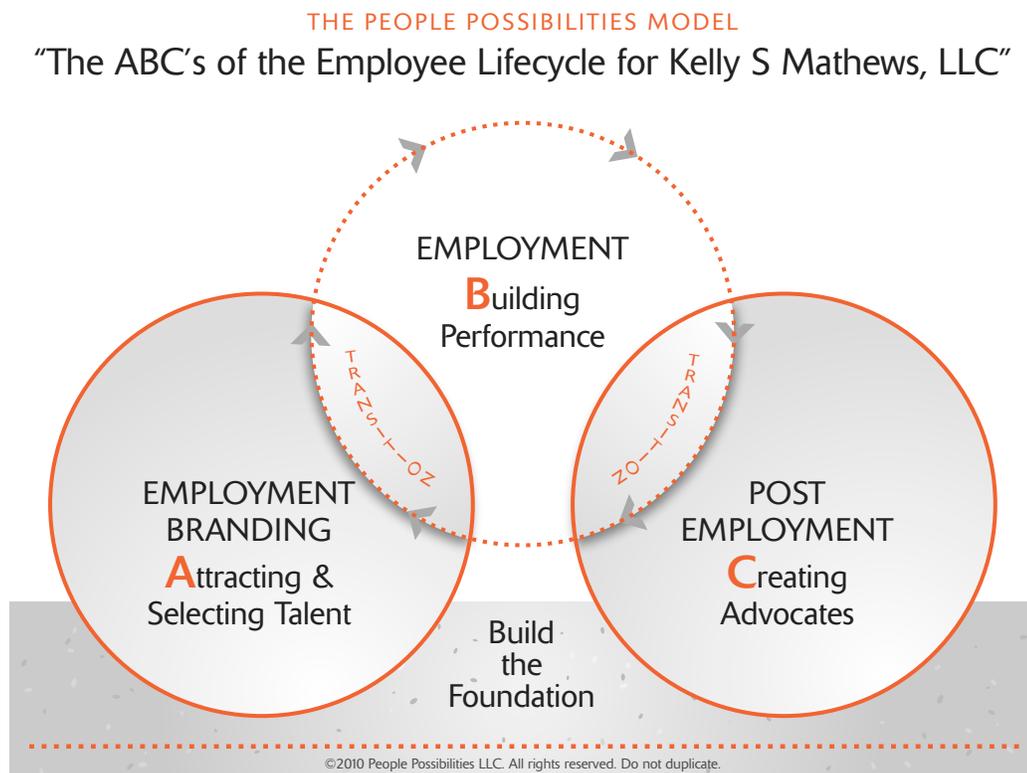
### Challenge – HR Structure, Growth Plans

*"I realized my company was too big to call it an accident. It was time for me to go from entrepreneur to CEO, but I was determined to keep the positive, happy, family culture we'd carefully built."* – Kelly Mathews, CPA

The company's HR policy had always been based on the Golden Rule – Do Unto Others. But with a growing staff and long-term employees asking questions about their futures, it was time for a more formal approach. There had been no employee handbook, no job descriptions, no formal feedback process to guide employees. The company was highly successful and had a very special family culture but needed a platform to launch from in order to grow to the next level. The challenge was how to maintain their unique culture but bring structure around it.

### Solution – People Possibilities

People Possibilities assessed the situation and immediately implemented their “ABC’s of the Employee Lifecycle” process. They began by “Creating the Foundation” which included the HR Audit and writing the Employee Handbook to represent policies and procedures to match the culture of the organization.



**B = Building Performance.** Implemented job descriptions and the employee development process as well as one-to-one coaching with key leaders.

**A = Attracting & Selecting Talent.** The job descriptions supported the attraction of the right people for the jobs. From this came the organizational chart and succession planning process thus providing a career path for employees.

**C = Creating Advocates.** With A and B in place, C takes care of itself. Employees leave happy and feel they've had a positive experience.

*“As a CPA, I’m highly process oriented. I wanted to know how it was going to be done. Kathi stepped right in with a very clear and defined process that included set deliverables and a fixed cost. I knew immediately People Possibilities was the right choice for me.”– Kelly Mathews, CPA*

As the relationship with People Possibilities evolved, additional strategic initiatives were addressed. During the succession planning process the question of having the right personnel in place to grow the business was addressed by fine tuning the business model and creating job descriptions. This then led to the implementation of a formal review process. Feedback received from this process was used to help build the management team by identifying two key employees and hiring a third experienced manager. These three leaders became responsible for the company’s three service lines.

With a business model developed for growth and key leaders identified, People Possibilities helped Ms. Mathews establish a “back-office” by hiring an Executive Assistant/HR Administrator to monitor and implement the HR plans to support KSMLLC’s growth. As her team developed, Ms. Mathews was able to step back from the day-to-day and focus more strategically on the desired growth of the company. At this point the company turned the corner from entrepreneurial (one funnel through which everything must flow) to formal business with sights on significant growth.

During this phase People Possibilities delivered the following:

- Creation of employee handbook to reflect and promote the unique culture.
- Formal job descriptions for all positions to clarify job expectations, roles and responsibilities. Identification of core competencies that were most important for success in the job and aligned with the firm’s core values, goals and strategy. Identified the threshold behavioral and technical competencies required at each level.
- Formal procedures for sourcing, screening and recruiting candidates with a structured process for onboarding new hires. Assisted in identifying vendors to provide background check and drug screening services.
- Proactive hiring strategy to ensure the right staff levels are in place to match the desired growth.
- Performance review forms and processes tied to performance goals by position and focused on employee development and career planning.
- Coaching of key managers.
- Creation of a succession plan to identify and close gaps in project management and signature authority. Identification where experienced hires are needed for key positions.

With the company’s immediate needs addressed Ms. Mathews engaged in executive coaching with People Possibilities. Ms. Mathews wanted to remove any barriers that were preventing her company from soaring. As an accomplished professional, she was interested in anything that would improve the company and make it even more successful.

*“I found coaching with Kathi to be a very insightful process. I feel I’m now a better business person, especially in addressing the career plans of my staff and the future growth of my company. I was particularly impressed with Kathi’s ability to match my personality. She gave me tools that fit my individual style and resonated with me. Kathi’s style is to teach and mentor. Due to this experience, we can now stand on our own and have a solid HR foundation built for growth. – Kelly Mathews, CPA*

## Result — Peace of Mind. Plans for the Future.

Ms. Mathews and her company are in position to double their revenue in the next five years. Since engaging with People Possibilities, the company has hired a controller, an IT professional, and all three service line leaders are in place to ensure the service lines and staff are ready for the increased business. The entire team is working in harmony and the staffing plan is in place for growth.

Employees have responded very well to the enhancements and are excited about their futures and the growth plans of the company. All feedback from the team has been very positive.

*"When I hired Kathi and People Possibilities, I was very concerned about our culture. I was feeling stress about employee issues that I'd never had to deal with before and I was working all the time because everything had to go through me. I now have the tools and structure in place along with the right people doing the right things at the right time. I consider Kathi to be a key spoke in our wheel."* – Kelly Mathews, CPA

## About Kelly S Mathews LLC

Kelly S Mathews, LLC specializes in volume-based motor fuels tax return preparation and motor fuels tax consulting services. Established in 2003, the Company has grown to one of the largest specialized motor fuels tax firms in the country. Ms. Mathews is an active member of WPO (Women Presidents' Organization) and the AICPA. People Possibilities knew they had what it took and submitted Kelly S Mathews, LLC, as a candidate for Houston's 101 Best and Brightest Companies to Work For. They were right. The Company has been a repeat Houston winner in 2013, 2014 and 2015 and they won at the national level in 2015.

## Epilogue

Since the two years Ms. Mathews has been working with People Possibilities, the firm has doubled in size. Ms. Mathews summarizes her work with People Possibilities in the best possible way — "I now have my weekends back; I work less and customer satisfaction and quality has continued. I couldn't be more pleased with the work we've done together." ■

## Be more.™

At the heart of People Possibilities is the belief that transitions are extraordinary opportunities for innovation, relationship-building and growth. We empower leaders to transform the workplace by creating innovative solutions for people at work.

Building a bridge to a new way of thinking, People Possibilities focuses on optimizing the power of positive change. We partner with business leaders to understand the complexities of human interaction and provide ideas to foster the employee lifecycle and increase productivity.

At People Possibilities we are changing the culture of business one leader at a time.



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