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Improving Processes. Instilling Expertise.



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# THE SNAIL ECONOMY

Over the next 20 years, the U.S. economy is likely to grow only 2% a year. That's down from 3% or better since World War II. Blame it on an aging population and sluggish productivity growth. Bad news for stocks and social harmony.



A Metaphor for the New Normal?



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# Old Normal

Vs

# New Normal



1996

MarketCap: \$28B

Employees: 140,000



2012

*Bankrupt*

Employees: 17,000



April 2012

MarketCap: \$1B

Employees: 13

# Old Normal

Vs

# New Normal



**A Business Model based on late fees**



**+ Streaming**

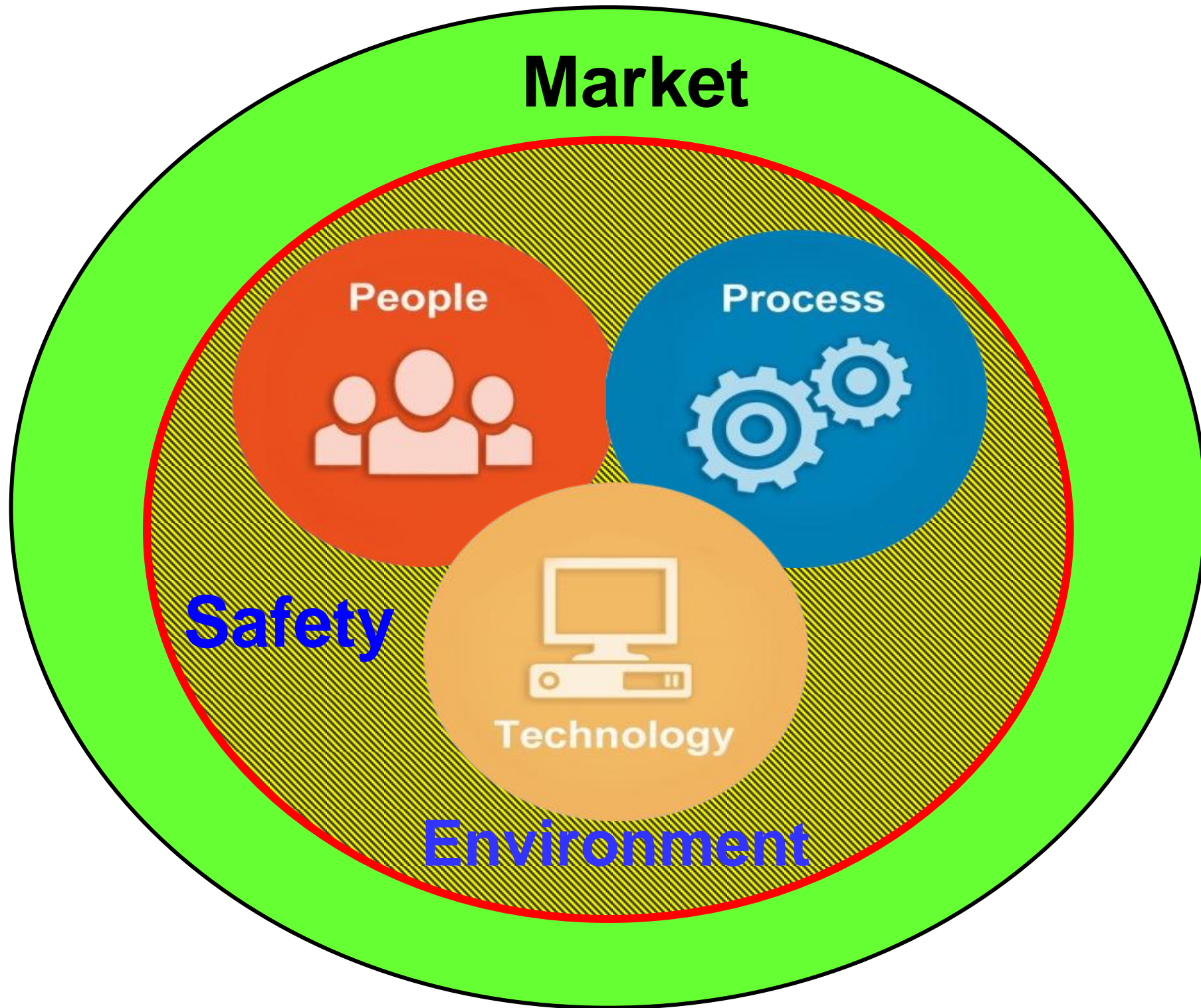


**What does this have to do with our current market environment?**



THE WIZARD OF OZ

**We're not in  
Kansas  
anymore  
Toto!**



**What's  
Different**

**?**

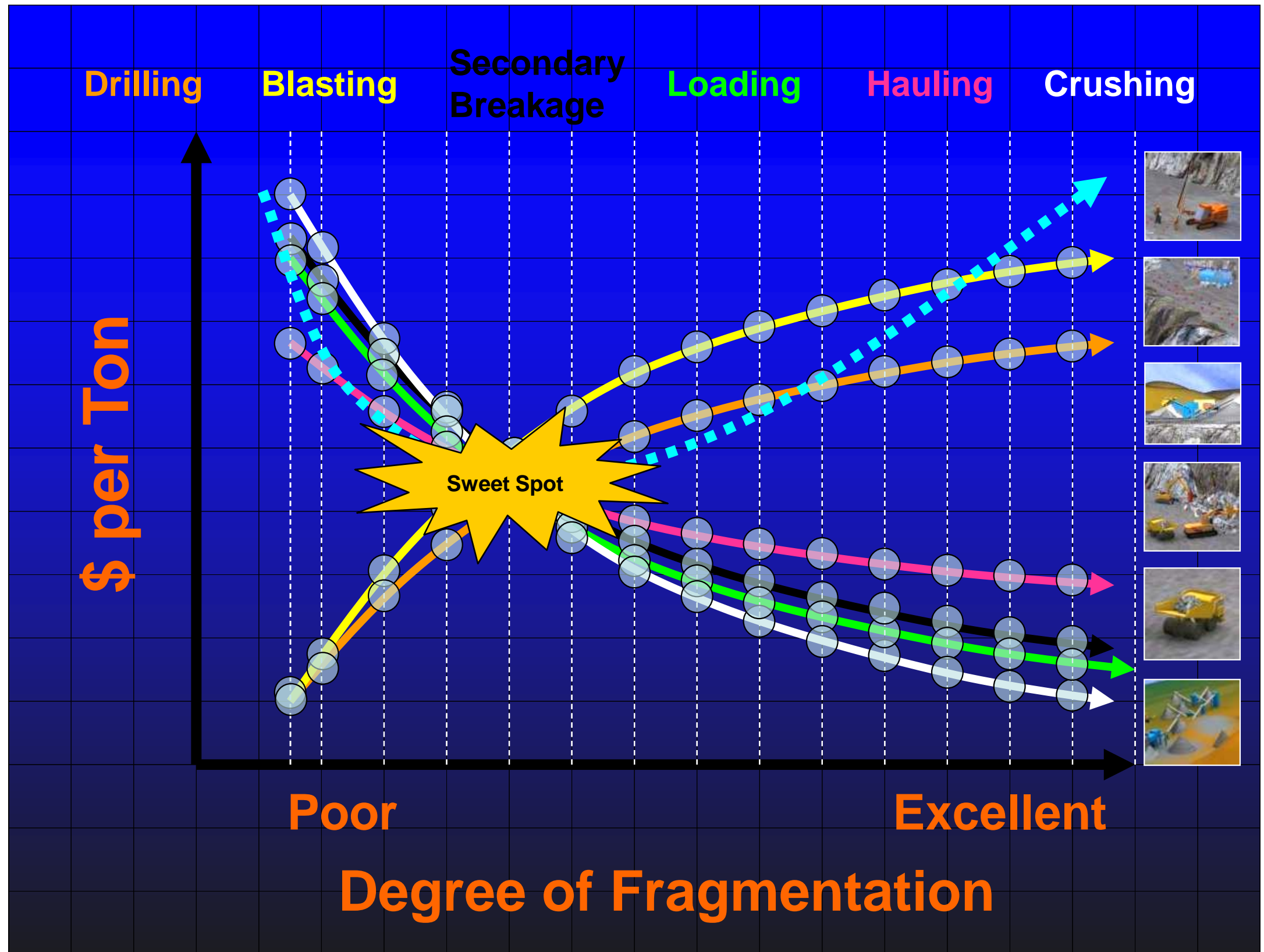
**New Normal  
Market**

**Making a  
Profit!**

# Value Chain Management

PLANNING	DRILLING	BLASTING	LOADING HAULING	CRUSHING	SCREENING AND SIZING
					
REDUCING YOUR ENERGY FOOTPRINT THROUGH	REDUCING YOUR ENERGY FOOTPRINT THROUGH	REDUCING YOUR ENERGY FOOTPRINT THROUGH	REDUCING YOUR ENERGY FOOTPRINT THROUGH	REDUCING YOUR ENERGY FOOTPRINT THROUGH	REDUCING YOUR ENERGY FOOTPRINT THROUGH
Value Chain Management	Value Chain Management	Value Chain Management	Value Chain Management	Value Chain Management	Value Chain Management

# Total Enterprise Economic Model







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