



CASE STUDY

Building Solutions for Strategic Integrity Across Departments

ECOSYSTEMS

M&A

2021

CONTEXT

Eco-systems are designed with the intent to support simultaneous initiatives, but can feel real pains when it comes to managing, implementing, and adjusting a multitude of strategies across inevitable silos.

WHAT WE DID

We partnered with a high-growth healthcare company needing all of their clinical acquisitions to maintain organizational integrity without giving up independence. Additionally, leadership needed a bird's eye view into each clinic so they could understand strategic progress and track impact of resources.

IMPACT

Our customized, cloud-based solution enabled the client to create a complete operational profile for any opportunity they were contemplating acquiring within a matter of days. It also gave the company an evaluation tool to use on existing clinics to understand the current state, positive and negative effects on the clinic, and adjust their strategies accordingly.

THE CHALLENGE

**Create an easily
implemented toolset to
improve strategic integrity
across every department.**

DEPARTMENTAL CHALLENGES

Department	Pain Point	Need
Operations	Bringing multiple clinics into the corporate environment	<ul style="list-style-type: none">• A standard to measure acquisitions against• Clearly prioritize the strategic changes specific to the clinic's needs
M&A	Identifying the status of a prospective clinic's operational behaviors and maturity	<ul style="list-style-type: none">• Cut the time required to vet & implement clinics and accelerate growth
Management	Gaining clarity and proof of "why" KPI's are being impacted positively or negatively	<ul style="list-style-type: none">• Equip teams with demonstrations of both "why" they got to where they are, "what" next steps are in the plan, so they can pivot accordingly as needed
Investors/Board	Proving cause of impact so decision makers can understand how investments are performing	<ul style="list-style-type: none">• Provide confidence in numbers and an understanding of the behaviors it will take to change them

OPERATIONS


Operations is challenged with bringing in multiple clinics into the corporate environment.

So then the challenge becomes:

Clinics benefit from shared resources, but each of those entities come in with their own processes, structures, biases, fears, and wishes for the clinic.

We deem that “baggage,” Operational Behaviors.

Each clinic is at a different level of Operational Behavior even well after a traditional integration is complete.

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- **How to manage multiple strategies across multiple adopted clinics?**
 - **How does operations demonstrate the impact of these acquisitions?**
 - **Can we prove the influence of these behaviors?**
 - **How are these strategies impacting overall ROI?**

SOLUTION

Our custom platform provided a “standard” by which internal operations could begin to measure and demonstrate each of those elements. This also allowed operations to clearly prioritize the strategic changes specific to the clinic’s needs. The Journey Strategic Platform serves as an organization’s “control panel,” if you will, providing the ability to determine where each business is in the execution of implemented strategies.

M&A

The M&A team, whether in house or external, has the challenge of identifying the status of a prospective clinic's operational behaviors and maturity.

Currently evaluation is a time consuming process centered around KPI's, market potential, due diligence and other standard M&A measurements.

Our main focuses for their corporate development teams were:



- **How can this team find out if a potential acquisition has the capacity to operate under a new entity?**
- **How can they identify operational pitfalls earlier on in the process and de-risk opportunities on the front end rather than after the deal is done?**
- **Is there a way to prove what should be prioritized within the first 100 days of integration?**

SOLUTION

We built the Journey Strategic Platform to cut the time required to vet potential partners and accelerate growth.

For our M&A clients, the suite of Assessments hold real value. Giving them a way to measure an opportunity's Change Capacity and gain access to their Internal Processes within a matter of hours has allowed the entire sourcing process to quicken and better acquisitions to be made.

MANAGEMENT

Cause and effect of strategies have had too many variables and external influences for management to calculate with accuracy.



Gaining clarity and proof of “why” KPI’s are being impacted positively or negatively is the puzzle management spends most of its time trying to solve.

Plus, the ability to dive down from 50k feet and fly over to remediate challenges is clouded by ambiguity to where their focus needs to be. All of this strains time and resources, causing delays and potentially a bad position with investors or board members if teams are unable to articulate the specifics.

SOLUTION

Utilizing the platform, the management team is able to look out across all clinics to see existing KPI’s as well as new KPI’s that are centered around operational behavioral changes. From there they can zoom into specific areas of the business with laser focus and directives.

By using Journey to guide your strategic planning process, teams are equipped with demonstrations of both “why” they got to where they are, “what” next steps are in the plan, and can pivot quickly as needed. The overall clarity enables management to deeper understand the types of clinics being rolled up into their environments and make more informed, predictive decisions.

INVESTORS/BOARD

The board and investors have a need to understand how investments are performing, but are limited by a team's lack of ability to clearly demonstrate impact.

Without real time knowledge of what is and isn't working, allocation of resources cannot be amended as quickly as it is needed to.



“KPI’s are great, but Journey helps me understand what my money is doing and where I can jump in to help.”

SOLUTION

Investors' hands are tied until proof of impact is delivered, so we created portions of the platform to generate automatic reporting with board meetings in mind.

By using Strategy Builder, Wins Tracker, and other process enhancement features of the tool alongside a strategic plan, teams are able to demonstrate impact when it is most necessary, providing confidence in the numbers and understanding of what behaviors it will take to change them.

CONCLUSION

Bringing an acquisition into one's portfolio is the first of many commitments to drive profitability, but integrating existing teams and processes poses the biggest strategic threat to the business.

Keeping Strategic Integrity Intact

1

Understand the Change Capacity of each team

2

Rank strategies based on impact to the business according to an organization or team's current state

3

Elevate the experience of your board by providing clarity and demonstrating the impact of each investment

If you would like to learn more about measuring a team's Capacity for Change or removing organizational blindspots, there are Use Cases for those as well.

Now that strategic integrity can be measured

HERE'S HOW JOURNEY CAN HELP

01

Start with a Business 360 of your own

A three-phase process facilitated by New Orchard, collecting the data leaders need to make their next big decision including: alignment, change capacity and operational maturity.

02

Brief your teams on the results

Once leadership has a clear picture of its current team alignment, capacity for change and operational maturity, it is time to bring additional departments into the fold.

03

Customize your platform

Now that the business has a current state analysis and teams are aligned, the organization is ready to design its growth strategy accordingly with tools that support incremental growth and demonstrate impact quickly.

JOURNEY

