

Consulting Firm Case Study

At A Glance

A consulting firm was hired by a high-profile Venture Capital firm to help measure and improve internal alignment of the leadership team as they prepared to restructure and improve response times to investment opportunities. This definition aided strategic planning visibility, implementation, and creation of their new culture.

Key Metrics

The most impactful result was an unsaid difference in how the team approaches Resource Allocation. A portion of leadership made decisions with a scarcity mindset and the other from an investment point of view. This was greatly affecting growth and speed, so an objective visualization of this misalignment, clear definition of their future decision basis, and implementation/communication guides were implemented.

CHALLENGES

- Change management is often very emotional. The client needed an objective point of view to get through these discussions effectively.
- The client had consistent revenue but was missing out on opportunities due to indecision.
- Client teams were moving away from their informal culture, looking to improve processes without sacrificing efficiency.

SOLUTIONS

Looking into 2023, the consultant focused on arming their client with concrete Business Identity principles. Improving consensus and increasing decision making speed for teams through:



Business Identity Index

1. Relevant metrics for strategic planning
2. Consensus on current state



Aspirational Business Identity Exercise

1. Identify North Star
2. ROI
3. Better investments

FINDINGS

1

Relevant Metrics for Strategic Planning

The Business Identity Index revealed gaps in the C-Suite's perspective, specifically around resource allocation decisions. There was a clear split between one leader and the remaining team.

2

Consensus on Current State

By objectively measuring internal alignment, the consultant could lead their client's offsite sessions with efficiency and accuracy, allowing them to quickly deliver consensus and shift focus towards designing action steps.

3

Identify North Star and Communicate Decision Basis

Leadership was preparing for a restructure and needed a framework to identify how to best function during and after these changes. The consultant used the BII aspirational exercise during the client offsite to expedite these decisions and design clear communication for supporting teams.