

ENTERPRISE OPERATING SYSTEM TRANSFORMATION

100% REVENUE GROWTH, 72% CLIENT RESPONSE TIME IMPROVEMENT



PROBLEM

A financial services company was struggling with various operational issues in terms of servicing client request backlog, uncontrolled expenses, achieving strategic objectives, and conflicts within the management team.



OBJECTIVE

Implement a c-suite operating system to instill accountability and discipline around strategic objective identification and related initiatives execution as well as a process for issues prioritization and problem solving.



ROOT CAUSE

The company culture was extremely day to day tactically focused. Longer term strategic goals were not evaluated regularly, nor were there leading indicators other than revenue to monitor progress and make necessary proactive adjustments.



SOLUTION

Implemented a formal operating system at the c-suite level that included weekly, quarterly, and annual strategic development, implementation, and review processes. Also, implemented a company wide Lean implementation to empower and give the tools for each department and employee to identify blocking issues and develop and implement solutions for continuous improvement.

RESULT

Implemented a streamlined organizational structure, including right people, right seats implementation, 72% reduction in client response cycle time, 17% expense reduction. Within 3 years, achieved 100% revenue growth.

