

Industry: Financial

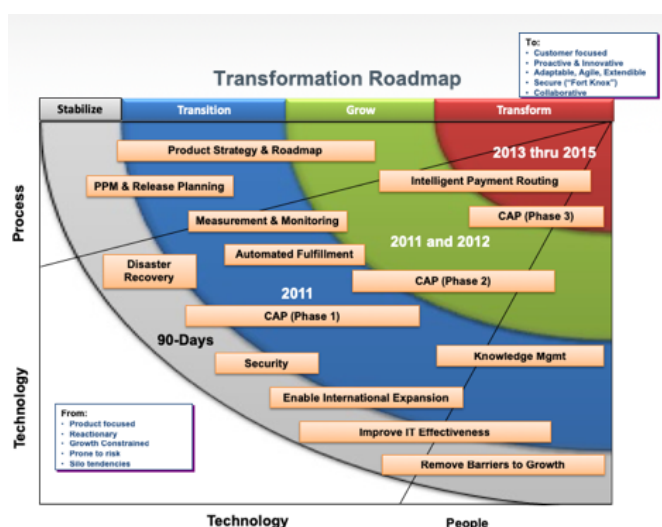
Scenario: Transformation Program to Drive Growth

Challenges:

A privately-owned financial institution was being positioned for a sale, but the owner was concerned about obtaining the full valuation in what was a challenging market. The organization also struggled with quality issues and needed to secure a top-tier customer to ensure its immediate financial position and preserve its growth model within a new domain.

Solution:

A risk assessment was performed to evaluate the business model, the products and the underlying technologies used to support the business. A set of findings and opportunities to improve the overall position of the organization were presented as part of a transformation roadmap. The executive management team reviewed the roadmap, which enabled the team to develop a set of short- and medium-term action plans to improve the operations and the technology platforms and present a consolidated vision for a product platform to drive growth.



Results:

The organization's systems were stabilized, quality issues resolved, and the organization secured its contract with the top-tier customer. Furthermore, a progressive roadmap was initiated to consolidate and improve technology platforms while reducing operating costs. A revamped product line was developed with a new marketing campaign to drive sales and secure new contracts in adjacent markets. The organization was eventually sold for the desired multiplier as originally sought by the private investor.