

## Case Study

### Managing Growth Cycles

**Issue:** Rapid growth challenges an organization to either rethink office processes or become a casualty of its own success.

**Scenario:** After doing business virtually the same way for 10 years, one client ran into a roadblock. Systems that worked for a small company, no longer applied to a mid-sized organization. As the firm grew the reporting structure became murkier; employees had titles but no job descriptions; and workflow procedures were undefined. To add to the confusion, the company had no formal project tracking system. This made it hard to determine both the status of a job as well as its profitability.

Most critical to the future success of the organization was the fact that the principals' perception of the firm was based on the past. They were marketing the old company, not the new.

**Approach:** After interviewing the president and staff, Levy Associates developed a priority list and an implementation plan. Teams were organized to accomplish specific tasks including selecting software; creating job descriptions; writing a mission statement; repositioning the company; and updating presentation materials. Our most significant achievement was helping the owner make the psychological and emotional leap from a small, cozy shop to a high-powered mid-sized firm. Levy Associates guided the transition and worked with the owner on strengthening leadership skills and rethinking the business.

**Results:** The firm now attracts larger clients consistent with their more sophisticated positioning. By marketing themselves as strategic partners, the company has more influence over decisions and outcomes. Internally, the office is prepared to handle more complex projects. Streamlined systems and procedures make it possible to complete projects faster, more efficiently, and with stricter quality control. Projects are more profitable because it is easier to prepare accurate estimates and track expenses. Most importantly, under the direction of strong leadership, the staff is maturing and growing.

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### **Staff Development: Training Helps Ensure Employee's Success**

**Issue:** An employee can be promoted to a new position but without proper training he or she is likely to fail. And failure can be costly. Not only does an organization lose its investment in the employee; it also faces the costs associated with the disruption of business as well as finding, hiring and training a new person.

**Scenario:** The owner of a \$20 million a year business was grooming his top salesperson to become the General Manager when he retired. This employee was the highest producer in the firm. In addition, she had created and developed the corporate sales division, which became the company's highest profit center.

As part of this plan, the owner promoted the salesperson to management and put her in charge of hiring her own staff. That's when things started to unravel. New employees would stay for an average of three months and then quit.

The owner became angry, impatient and fearful that his succession plan was coming undone. He was losing confidence in his star performer and began micro-managing her every move. Needless to say, this only made things worse.

**Approach:** To resolve the situation, Levy Associates served as a mediator between the two parties which immediately helped dissipate the tension that had been building. As emotions calmed, Levy Associates worked directly with the employee and taught her how to become an effective manager.

Levy Associates recognized that the employee's initial failure as a manager was predictable. As a salesperson she only had to rely on herself. She was excellent with clients, could anticipate their needs, and work efficiently and reliably. But teaching the job to others took an entirely different set of skills.

**Results:** The employee is again the top producer, but now, she's also an effective manager. Her career is back on track as she prepares to take on management of the entire company.

## Case Study

### **Partnerships: Breaking Old Patterns**

- Issue:** Too often in partnerships small annoyances build up and important issues are avoided. Suddenly a business that started out strong is transformed into a hostile environment for partners and staff alike.
- Scenario:** Three principals contacted Levy Associates with a partnership that was on the brink of collapse. Ironically, the business was doing extremely well. Every decision the partners made seemed to be the right one; every dollar invested produced multiples in return. The partnership, on the other hand, was unraveling. A collaboration that had started as a friendship was deteriorating into a sniping match.
- Approach:** Levy Associates helps the individuals in a partnership separate emotional responses from core issues. This enables partners to communicate effectively so they can explore their goals and ambitions, strengths and weaknesses. Fortunately, for this partnership, each person had strong and complementary business skills. Levy Associates helped the principles define roles and responsibilities; examine management issues; and review the business plan and the buy/sell agreement. Each person had the opportunity to share his or her point of view and to heard.
- Results:** Levy Associates helped the partners reestablish and strengthen lines of communication. They began to meet on a regular basis to keep up with day-to-day business issues. In addition, they held retreats for the purpose of long range planning. Because roles and responsibilities were clearly defined, each person had realistic expectations of the others. As a result of our meetings, the partners established a more consistent management style, which helped the staff. Over time, the friendship has been renewed and the business is thriving. Most importantly, the partners have a new respect for each others' skills and have made a commitment to continue working together.

## **Case Study**

### **Facilitating A Board Retreat**

**Issue:** A 15-year old community-based nonprofit organization wanted to recreate its scope and mission

**Scenario:** The Board of Directors devoted a daylong retreat to discuss the future direction of the organization.

**Approach:** Prior to the retreat Levy Associates worked closely with the executive director and executive committee to define key issues, clarify objectives, identify deliverables, structure discussion points, and create an agenda. The challenge was to create a day that balanced presenting information; promoting discussion; and accomplishing the defined task within the given timeframe.

**Results:** Acting as facilitator, Louise Levy introduced the guidelines for the day, presented speakers, led productive discussions and kept the meeting on track. The success of the retreat was measured by the fact that board members were able to talk about important issues; the discussion progressed in a productive manner; and a tangible product was produced by the end of the day. As a result of careful organization and advanced planning, the board was able to create a six-month planning process that would enable them to define the new direction of their organization.