



## **CONSULTING PROJECT EXAMPLE: National Sales Company**

### **Organization**

This family-owned business is a sales company with national and international customers, and has under 20 employees.

### **The Situation**

The company President, who was the second generation, and his deputy, representing the third generation, wanted to take proactive steps to keep the company competitive, while preparing for the President to hand over total control to his deputy.

### **Objectives**

1. Planning and managing the transition process from the President to the Deputy, with a goal of having the Deputy become President in 12-18 months.
2. Providing the deputy the leadership skills necessary to lead the company into the future.
3. Strengthening the team so that people are focused on working together collaboratively to meet customer needs.
4. Achieving more clarity in roles and responsibilities currently, and in the future.
5. Improving productivity by getting people to take personal responsibility for their work.
6. Improving profitability.

### **Methods**

- Administered the Strategic Alignment Survey, and interviewed employees to determine areas that needed improvement.
- Facilitated offsite meetings, and several half-day meetings with the team to work on improving trust and aligning the team with the company purpose, vision, and values.
- Provided leadership coaching to the deputy, and facilitated discussions between the President and deputy on accelerating the transition process.

### **Results**

- Deputy became President and CEO, with the former President's blessing and full support, within four months.
- The new President's leadership abilities have improved to the point where his confidence has increased, and he has won over the employees on his ability run the company, and grow its business.
- Clarified roles and responsibilities of all employees.
- Greater accountability with a strong emphasis on results.