



[www.profitnessadvisors.com](http://www.profitnessadvisors.com)  
[pagl@profitnessadvisors.com](mailto:pagl@profitnessadvisors.com)

---

## Case Study (Mid 2005)

Business Health Assessment

### Background

The client was among the portfolio of businesses in a major holding company. Their core business includes integrated financial, property and utility management services. The President and the Vice President of Operations were joint executive sponsors. The holding company had tended to continually change its business mix and had lost sight of the quality of its infrastructure components, including business processes, IT, relationship management, change management and a management system.

### The Solution

This initiative assessed business processes, existing systems, tools, and technologies. The assessment highlighted the need for major changes in the way that the core businesses performed and the way that change was introduced. As a result, a major business transformation initiative was launched that included some re-engineering of business processes, the implementation of a tool for relationship management (CRM), the re-tooling of some legacy business systems, a national training program and the introduction of a discipline to manage change. In parallel, a national management system including performance metrics was introduced.

While executives, the Steering Committee and staff resisted many of the changes initially, the end result contributed to improved business results, stronger people performance and increased customer satisfaction. The overall investment in this initiative was leveraged within 18 months for \$25 million.

### Consultant / Case Author

David Gregory ([dgregory@profitnessadvisors.com](mailto:dgregory@profitnessadvisors.com))

**Note.** This engagement was conducted by ProFitness Advisors Group Partner David Gregory under the Gregory & Associates brand

*“Improving business results through team effectiveness”*