



## BUSINESS DESCRIPTION

The Strategy Projects LP is a consulting firm founded by a collective of business owners who leverage their extensive experiences and business line expertise to deliver maximum value for clients through process excellence.



## WHY US?

- We value our clients and their trust by providing the best solutions for their business line and market footprint.
- We deliver services in varied types of business categories.
- Each member of our business owner collective is highly experienced and successful in their respective area of expertise.



## OUR MISSION

To provide eminent & effective growth and excellence solutions that aim to fulfill client goals for their business.



## INDUSTRY & EXPERTISE

Our business owner collective brings years of expertise in the following markets:

- Finance and Wealth Management
- Health Insurance
- Property Insurance
- Retail Franchise Operations
- Land Development and Real Estate
- Commercial and Residential Construction
- Enterprise IT
- Media Production: Videography / Photography
- Graphic Design and Branding
- LEAN Six Sigma / SCRUM / AGILE



## ONE PAGE EXECUTIVE SUMMARY

PEOPLE  
PROCESSES  
TECHNOLOGY



## DELIVERABLES & TIMELINE

### DEEP DIVE DIAGNOSTIC: 4 - 6 WEEKS

#### DISCOVERY WEEK 1

- Our experts will review your organization's documentation including SOP, P&P, P&L, and Business Plan to learn as much as possible about your current processes.
- Market Analysis of your current performance against competitors in the market from smaller, comparable, and larger sized firms.

#### ONSITE WORKSHOP(S) WEEKS 2 - 3

- 1-on-1 Leadership interviews to understand Pain Areas, Solutions, and Transition Timelines.
- End-to-End "As-Is" Process Road-mapping of the organization.
- FTE Shadowing to understand daily Value / Non-Value add activities.
- Gap Analysis Data Gathering
- IT Diagnostic / Best Practices / Enterprise & User End.
- Early Solution Identification vs. Long Transformation.

#### DATA DIGESTION WEEK 4 / 5

- Gap Analysis Completion.
- Solution Architecture.
- Transformation Road-map | Immediate Impact vs. Long Term.
- Benchmark and KPI Priorities.
- IT specific recommendations.

#### PRESENTATION FINAL WEEK

- Full Gap Analysis Discussion.
- Market Comparison Discussion.
- Solution Implementation Discussion.
- Next Steps Discussion.