

360 Business and Technology Platform & Results Multiplier

The 360 platform supports leaders with a “done for you” approach to strategy, alignment, implementation, and ongoing execution

THE GOAL IN OUR CASE STUDIES

Help our Clients to Accomplish their Key Objectives

100%

Of users report an improvement in alignment, accountability and action/execution

50-75%

Average improvement in alignment, accountability and execution

Extremely Effective

In terms of strategic planning, creating accountability, and driving long-term execution

>= Very Effective

In terms of facilitating decision making, visibility, planning, and alignment

“Execution360 has allowed our firm to get aligned on how we are performing today, the current bottlenecks, the opportunities, and the plan to address those items.

Our leadership team is on the same page, our team knows the plan, and we are accountable to what we need to do.”



Innovative startup risk management provider that developed a new insurance product for a new market

“Executing on our calling strategy, and making sure that our key indicators of success were being met well in advance of our calling results was our key driver. We were happy to be able to hit those key metrics and demonstrate that our program had the ability to scale.”

CEO | Founder

Date: 2010—2014	Key Goal(s): Introduce product nationally and drive market education and acceptance to ultimately position the Company for a sale (Company was sold in 2014)
Revenue: <\$1M Annual Revenue	
Key Leader: CEO Founder	

Background

A startup risk management provider had designed a new specialty insurance product. The Company had solidified a top tier carrier as the product underwriter and received Series A Financing. The Company started with 3 founders and had grown to 9 total employees. Growth was driven primarily through direct sales and the Company had some initial success securing a very large client referred from a leading regional firm.

Key Problem

The product had been well received however the problem was scale. The Company was intentionally not focusing on profit, but rather needed to prove market acceptance and build out a reliable and repeatable sale process.

Key Objectives / Tactics

- Develop calling infrastructure within proprietary lead gen system
- Roll out and train 3rd party calling team (~10 people)
- Structure internal operation to support partners and a high volume of client interactions

Key Plan / Strategy

The Company decided to augment its sales and marketing strategy with a calling strategy designed to produce high volume appointments for its founders / partners.

Result

The company scaled its calling operation successfully and was ultimately sold to a large insurance carrier. The founders stayed aligned and executed, and held its calling operation to the standard needed to produce the target volume. Key adjustments were made along the way when leading indicators predicted future results outside of the threshold.

360: Key Metrics / KPIs

Financial:	Growth, Product Usage
Client:	Scheduled Activity, Activity Result, Appointment Reach/Miss/Reschedule Rates, Application Rate
Process:	Calling Operation Calls/Hr/Person, Reach Rate, Quality Rate, Marketing Channel
Team:	Incentive, Skills, Performance, Culture
Systems:	Leads Generated, Unique Calls Created