

Global Brokerage Services Company

Corporate Governance/Succession Planning/Strategic Business Planning and Implementation/Leadership Development/Improved Financial Performance

Mission/Purpose (Objective)

To integrate and leverage the entrepreneurship, innovation and leadership of the senior team

Business Challenge

The founder and Group Co-President of a brokerage services company that provides financial institutions with state-of-the art transaction processing, real-time information delivery services to streamline their operations and improve business efficiencies and investor communication services to the financial services industry worldwide was challenged to continue to dynamically grow his business.

Description of Marketing Offering

Getting it right with your senior leadership

Getting it right for you – Executive Consultation with Group Co-President

Process of Marketing Offering

<i>Assessment:</i>	Review and analysis of pertinent documentation, including existing planning processes and plans
<i>Planning:</i>	SL&A facilitated an offsite Strategic Planning Retreat for key leaders to address assessment results, leadership definitions, strategic planning processes, company vision, mission, goals, strategies and tactics
<i>Implementing and Aligning</i>	Development of Action Plans to support each tactic, including specific activities, responsibilities and milestones, strategy ownership, roles and responsibilities, execution tracking and contingency plan development and execution
<i>Developing Leadership</i>	Focused development of the senior and supporting management team to ensure that their capabilities and activities are fully aligned with organizational goals and strategies including: <ul style="list-style-type: none">○ Identification of current state leadership capabilities/corresponding developmental opportunities○ Individual coaching on roles and responsibilities relating to Strategic Plan execution○ Development of individual leadership development plans

Client Testimonials

Successful spin-off of the \$2 Billion entity with our client to lead the new NYSE entity.