



BACKGROUND

The hottest division of a leading global asset management corporation was stalling amid rapid growth in the sector the division served.

Had their traditional business activities peaked?

IF THEY GROW, WE GROW

A Case Study in an
Innovative Approach to
Growth - Resulting in
350% growth in 5 years.

THE STRATEGIC DILEMMA

An extensive market analysis indicated that sector growth was from the proliferation of smaller boutique asset management firms. These boutique firms were scaling growth by leveraging the investment products of other, larger asset management firms like those marketed by our client. This model was getting attention in the industry media. These firms were using an innovative approach to grow, and many preferred our client's products.

The opportunity was to establish a deep connection and support the growth capabilities of these smaller firms so that as they grew, so too would our client's division. But how could they make sure their corporate business development strategies would work for smaller entrepreneurial firms?

A Case Study in an Innovative Approach to Growth

THE ENGAGEMENT AND OUR APPROACH

Focused Momentum LLC (FM) was engaged to bring its experience developing strategy with entrepreneurial leaders to the small corporate team responsible for bringing custom growth solutions to their most loyal boutique clients. FM acted as strategist and process designer for all custom consulting engagements working closely with the small corporate team to deliver FM results within their corporate setting.

FM developed the consulting strategy and client engagement roadmap to create and deliver custom consulting engagements to this new market segment. These consulting projects were executed by the corporate team members trained in the Focused Momentum® methodology, using licensed FM strategy development tools and techniques and guided by Founder and Chief Strategist Cecilia Lynch.

Using select strategy development tools, FM-licensed business strategists brought their global corporation's immense reach, relationships, and resources to the leaders of these small firms so they could build winning growth plans.

THE RESULT

This unique approach to client loyalty was quickly noticed by the media tracking this emerging sector. This exposure resulted in many other market players partnering to grow the space, thus providing even greater growth capabilities to this thriving sector.

With FM's expertise in strategy development and its depth of understanding of the entrepreneurial mindset, this small team achieved astounding results. It added to the innovative reputation of its company and enhanced its image as the sector leader.

The unique approach to sector growth produced phenomenal results: 350% growth in 5 years for the firms that engaged in their consulting relationships.

OUR TRACK RECORD

A
YEAR
AHEAD
OF
PLAN

Strategic planning is arguably one of the most visible and significant undertakings for management. Yet alarmingly, 80-85% of strategic planning efforts are deemed a failure by those who lead them. More surprisingly, these figures represent an improvement. So, you might ask, if the odds of success in charting a new strategic direction are so low, should you even try? YES!



**"If you're ready to
commit to making
something great happen,
Focused Momentum is
the place to start."**

Strategic planning positions your organization for continued success.

Focused Momentum has guided clients in strategic planning for over 20 years, so we can examine our track record.

Our clients consistently achieve their strategic goals a year or more ahead of their plan.

Schedule a call to find
out how to work with us.