

Strategic Planning Initiative Insurance and Financial Services Company

Client

Insurance and Financial Services Company

Location

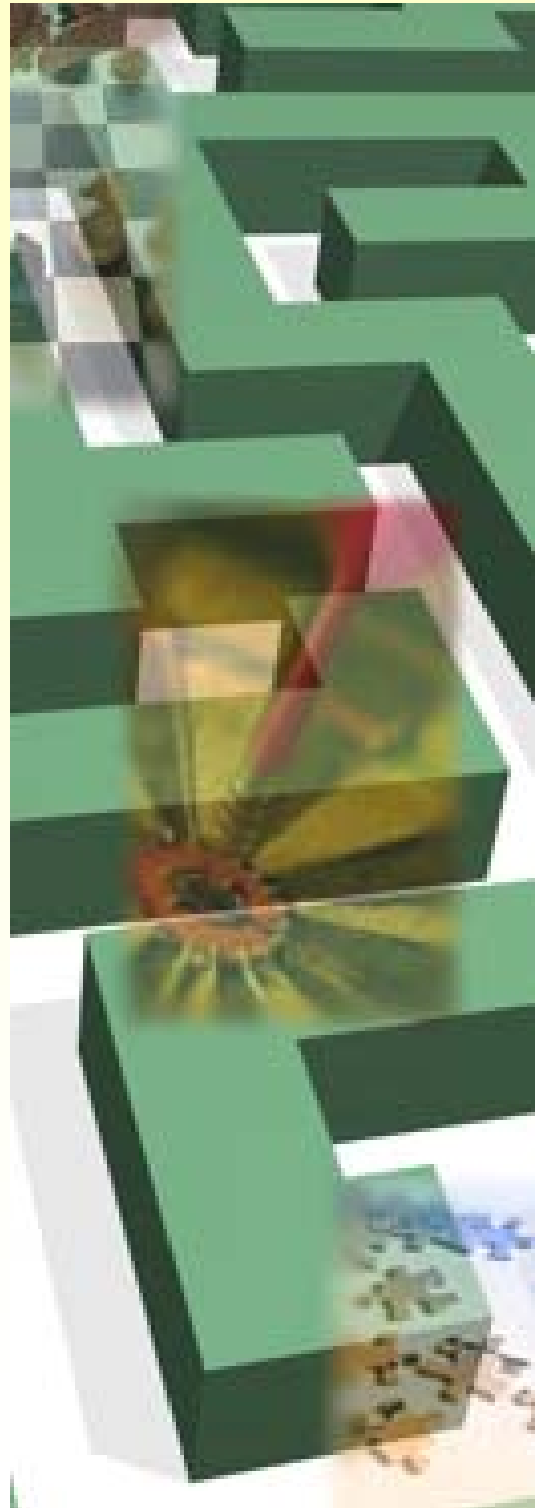
Ohio

The Hill Group's Role

- Research
- Survey Design
- Group Facilitation
- Data Analysis
- Strategy Formulation

Results

- Enhanced understanding of internal and external issues
- Amplified opportunities for business development
- Increased commitment to goal attainment
- Implemented performance measurement and management systems



Project Profile

An Ohio insurance and financial services company used services of The Hill Group, Inc. to develop a strategic plan to increase success, measured in reduced costs and increased revenue. The consulting team initially met with key stakeholders within the business unit to understand their unique needs. These interviews provided valuable insight, helped develop relationships, and established core planning areas. Specific areas for tactical development included recruitment, retention and growth, retentive sales, new sales, and referrals. The consulting team actively worked with key stakeholders to develop a strategic plan that was clearly defined, targeted, time-sensitive, and ensured accountability. The plan included the following areas:

- ◆ Environmental Scan/Risk Analysis
- ◆ Vision
- ◆ Mission
- ◆ Philosophies/Values
- ◆ Strategy Development
- ◆ Strategic Initiatives
- ◆ Tactical Plans
- ◆ Strategic Control

This participatory approach to creating an actionable, value-added strategic plan positioned our client to chart a course for future goal achievement.