

## Case Study #3

### *“Rising Leader” Accountant with 10 years of experience*

#### THE CHALLENGE

StrategyHorse was retained by an accounting professional to develop a strategy to double his client base and establish a regional brand for himself. The client was introverted and due to his relatively short tenure in the profession, he was not comfortable presenting himself as a credible trusted adviser. Like many of his CPA peers, he was not comfortable attending networking events and was shy about creating new connections on social media. His firm supported his growth efforts financially, but their hands-off management style left the client without the structured guidance he needed to gain much-needed confidence in his abilities.

#### THE APPROACH

The project began with helping the client recognize and define his own personal value proposition. Through our one-on-one coaching program, he was able to recognize the skills in his possession that would add value to his clients, colleagues and community. These skills were unrelated to his technical ability, and were instead focused on how he could provide crucial support to growing businesses and other professional peers.

#### THE SOLUTION

Once our client clearly understood the impact he wanted to have, we were able to create a specific road map designed to strategically promote his brand (and the brand of his firm), curate a rich network of ambassadors for his efforts and establish goals to measure his progress.

The metrics we used were based on the measurement of business development activities, growth of collected fees and internal career trajectory. We provided structured guidance to the client to help him navigate leadership challenges, team motivation, leveraging relationships, thought leadership, social media strategy and planning/agenda creation for all networking activities.

#### THE RESULTS

- ✓ Billables increased by **230%** in less than one year
- ✓ Received promotion and increased responsibility/compensation
- ✓ Adoption of a strategic approach to a detailed business development process
- ✓ Establishment of a network of stakeholders in the client’s growth, including complementary professionals, peers, clients and several civic organizations
- ✓ **10x** increase in social media followers and connections
- ✓ Exponential improvement in confidence, poise, executive presence and ability to effectively engage ambassadors for his personal brand as well as the brand of his firm
- ✓ Client accepted leadership positions within his firm and local and regional civic organizations

The qualitative results provided in this case study are reflective of a successful collaborative effort between StrategyHorse and our client. These results are indicative of many of StrategyHorse’s completed client engagements over the last five years. Each client is unique in its ability to realize its objectives and those that commit to a well-organized effort should also achieve comparable results\*.

\*StrategyHorse Consulting Group judiciously partners with its clients to promote robust growth, yet it does not guarantee results.