



CHANGE, GROW, SUCCEED...
WE ARE DRIVEN.

DETALUS
CONSULTING

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Strategic Development

A financial services firm was considering a number of potential strategic directions for its business:

- 1) expanding into new markets by strategically partnering with different third parties,
- 2) engaging with exit-partners in a buy-out, and
- 3) organically growing its business in a planned and methodical fashion.

The company hired Detalus to conduct a strategic development assessment of the firm's options. Detalus worked with the CEO and Board to:

- Understand and evaluate each of the strategic options,
- Determine the largest value creation opportunities and respective risks, and
- Design a plan for the CEO and his team to implement.

Executing on Detalus' recommendation, the CEO successfully entered in to a strategic agreement with a channel partner. The company since hired multiple individuals to manage the

growth opportunities resulting from the partnership.

Interim Executive Management

A financial technology company attempting to take its software product to market was running into a number of obstacles. Detalus was commissioned to serve as an interim Chief Operating Officer (COO) to:

- Bridge the gap between the technology team and the business team to ensure proper communication regarding product development and client feedback,
- Collaborate with the account management team to create scalable processes around client onboarding, client interaction, and client follow-up,
- Create a 30/60/90 day action plan for the entire firm, focusing on deprioritizing low-impact initiatives and aligning the various activities of the company, and
- Provide counsel to the founders and executive team on overall company direction.

The result was client traction, multiple channel partnership opportunities, and a request by the company to expand its working relationship with Detalus.

Building a Sales Program

A financial technology company needed to build out a sales and business development program as they expanded into a new market. The company was looking for a first-mover advantage in order to reach out to clients quickly. Detalus partnered with the company's management team to:

- Establish a go-to-market plan,
- Create traction and sales by speaking directly with clients,
- Hire and train the appropriate individuals to scale the initiative, and
- Implement processes to streamline client preparation / interaction / follow-up, internal reporting, and client-related best-practices.

The client, in turn, received new business opportunities and a scalable sales and business development program.

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Contact us to Explore Detalus Consulting Cases
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