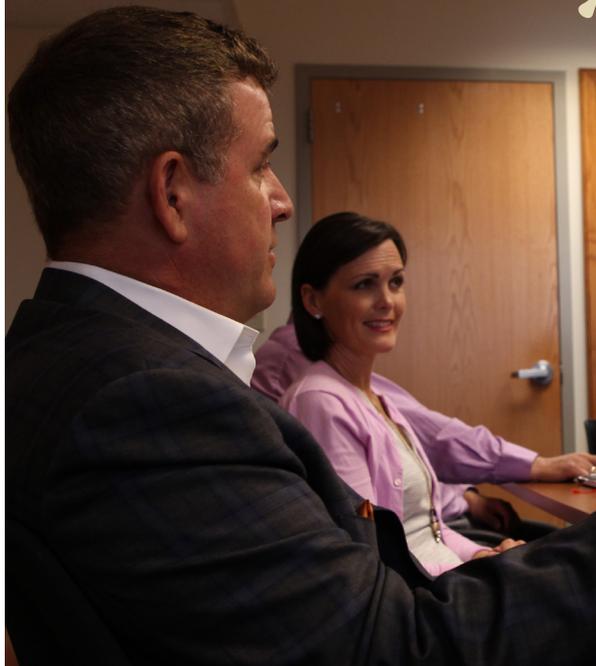


# client story The Yurconic Agency



snapshot

## Results after 24 months

Owner is able to travel with family for extended periods of time and the business runs smoothly: **priceless**

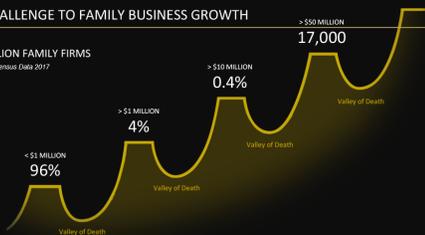
Growth in revenue: **31%**

Growth in profit: **31%**

ROI on investment: **19X in 24 months**

### THE CHALLENGE TO FAMILY BUSINESS GROWTH

25.2 MILLION FAMILY FIRMS  
Source: U.S. Census Data 2017



### Business Challenge:

Even with success, an owner can hit a plateau. The "Hub & Spoke" model was in full force preventing the company from scaling up (aka the owner was making too many daily decisions). The business was also missing key drivers like a strategic plan, the right people in senior positions, leadership development, a plan for recruiting sales talent and a next generation succession plan. The bottomline was stalled because the owner was spread thin running the business while also working to navigate an ever changing industry with complex regulations. Owner recognized he needed an outside perspective to build a business that could run without him.

### Owner Challenge:

- Owner not having enough time to focus on the big impact opportunities
- Too many decisions were making it all the way to the owner that should be handled by others on his team
- Key employee retirements

### What Owner Wanted:

- Someone else managing HR
- Business processes in place to reduce errors and improve efficiencies
- Business growth
- More time with his family without worrying about the business

### Results of the ValuePoint™ Process:

- Reorganized the leadership team – removed some, added others
- Developed a strategic plan and a meeting rhythm to review results, troubleshoot, and decide next steps
- Hired a COO
- Hire new Controller to replace retiring CFO
- Restructured the business units to reflect current needs of the market
- Implemented a management/leadership training program
- Re-branded the business to better position the company as a team vs an owner
- Hired strong leaders in two of the business units to drive results
- Implemented an annual company-wide meeting that united the team and provided clarity and direction
- Improved sales talent
- Maintained revenue and profitability in a business unit that lost nearly 50% of its income due to a regulatory change through new business and business model innovation



Ready to build a business that can run without you?  
**RSVP and join us for a ValuePoints™ Workshop!**

### BUILD VALUE

- Strategic Plan | Scaling Up
- Value Acceleration | Value Builder
- Leadership Team Development
- Succession Planning
- Family Business Governance

### UNLOCK WEALTH

- Financial Modeling
- Tax Buckets
- Lifestyle Expectations
- Harvest Income from the Business Now
- Manage Risk

### NEXT CHAPTER

- Prepare for the 5Ds
- Define Your Vision
- Transition To vs Leaving From
- Three Hurdles
- What's Your Runway

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