

# Case Example: Strategic Planning for Growth

## 1. Situation

- Regional start-up bank with rapid growth in first two years of operation
- Uncertainty about how to continue growing the bank quickly without over taxing core processes and internal systems
- Organizational structure under duress with increasing spans of controls as new hires were added
- Customer service beginning to suffer as the number of customers added outpaced the resources to satisfy their needs

## 3. Deliverables

- Developed a 3-year and 5-year growth strategy which positioned the bank to grow approximately 30% per year
- Established a migration plan and timeline of what new capabilities were needed and when they needed to come on line
- Established a new organizational structure to enable the growth to continue through the 5-year strategic plan horizon

**Consumer  
Products  
Company**

## 2. Key Issues

- Unclear what the strategic direction needed to be to navigate the growth opportunities
- No focused effort existed to look at core processes and systems to determine the growth capacity under the current infrastructure
- Key managers beginning to burn out due to increased demands with insufficient resources
- No plan existed in how to change the organizational structure to accommodate the forecasted growth

## 4. Results

- New strategy was met with approval from the Board of Directors and key investors
- The process and IT plan resulted in investments that had a ROI of less than 1 year
- New processes enabled gains in efficiency which allowed the forestalling of new hires by 15%

“With help from Conequity, we were able to develop real clarity around our 3 year and 5 year expected growth. This enabled us to get control of all the changes we had to make, the cost of those changes and how best to manage them.”

**CEO, Regional Bank**