

# Grow the company and grow the management by implementing a management training program that incorporates both strategic planning and skill development

## The Challenges

As the company grew,

1. Top down decision making failed to scale.
2. Time needed to be spent “on” the business to build infrastructure.
3. Management needed to ‘step up,’ both for the company and their own self desired development.
4. The team was frustrated with their own results and lack of progress.

The development of a **governance plan to keep the team and organization on track**. On going ‘strategy meetings’ which combine goal follow up with educational training on basic management skills such as communication, project management, performance management, team building etc. Just a few months into the program, David is seeing results.

*“Within 5 months, I can see a real difference in the team.”*

- David Cohen, CEO, Firestone Financial

## What Happened?

Even though the business was growing, CEO David Cohen was frustrated.

**Initiatives got started, but lost steam and never got finished.** He was **concerned that the company would “burst at the seams”** if infrastructure projects did not get. **His team was frustrated**; they felt stretched and often ineffective. They questioned their own skills and their ability to step beyond being “gatekeepers” within the business. Everyone wanted to leverage up but they didn’t know how.

## The Results

The team is:

1. **Clear** on the strategic priorities for the company.
2. **Progressing** on the goals; things are getting done.
3. **Improving** its ability to work together and is functional as true senior team vs. a group of individual functional managers.

*“She has the ability to understand a situation, make her analysis and give you a logical and concise opinion. She cuts right through to the issue. She has demonstrated the ability to also “bond” with our team members and has become a “welcomed” part of the process”*

- David Cohen, CEO, Firestone Financial

David engaged Melissa to help implement a strategic planning process. Based on some advice from David’s CEO Peer Group, Melissa and David **decided to customize a management that coupled the implementing a strategic planning process with a management development program.**

*“The training element is designed based upon the skill sets and needs of our participants, this affords us an efficient use of our time and resources.”*

- David Cohen, CEO, Firestone Financial

*“The services that are provided are tailored to our needs. This affords us an efficient use of our time and resources during the planning process. There is really no wasted time, in fact, her services, force us to be even more efficient with our time.”*

- David Cohen, CEO, Firestone Financial

The program consists of:  
*An annual session that both educates the team and facilitates them to develop a “strategic scorecard” with corporate goals.*

### Company:

Firestone Financial

### Customer Since:

2005

### CEO:

David Cohen

### The Business:

Provides financing to small and medium businesses.