

## CASE STUDY

# Owner Support / Business Advisory (Fractional CEO/CRO/CFO)

## Snapshot

Business Advisory to support the CEO and Management Team

**Industry Sector:** Digital Marketing Agency

**Business Type:** B2B

**Employee Size:** 35 employees

**Sales Revenue:** \$2m

**Year Founded:** 2016

## Our Client

Our client is a successful US based Digital Marketing company with 35 employees who has been in business for more than 5 years.



## PROBLEM/GOAL

Our client grew significantly over the previous 12 months more than doubling sales and headcount.

This tremendous growth also increased the complexity of the business affecting marketing, sales, operations, hiring and accounting.

The rapid growth created a gap in the ability for leaders to both manage the business while also considering future focused management questions requiring careful thought to manage growth.



## SOLUTION

The client realized that they needed the help of an outside consultant who understood the general management of an SMB enterprise who understood the various 'hats' worn by an SMB founder. They needed support from someone who had prior expertise who could guide them through important decisions avoiding any 'traps' or 'potholes' in the road ahead.

The solution was to build upon the management review process and help implement a management review process for the entire business. This helped identify pain points in the business and strategic projects to be prioritized and undertaken by staff and supported by the management consultant. A regular cadence of status meetings was established with the CEO and Management team to setup regular communications and prioritize projects.



## CASE STUDY

# Owner Support / Business Advisory (Fractional CEO/CRO/CFO)

## SERVICES PROVIDED

Creation of a monthly management review process and agenda to regularly review:

- Operational plans, KPIs and monthly reporting framework.
- Financial reporting and results.
- Organized support for strategic projects.

## RESULTS & BENEFITS

The result of the project was a well-defined management review process that systematically uncovered opportunities for improvement, helped address business challenges and created frameworks to assist company staff to build repeatable processes and best practices for the future.

The client is enjoying a more structured approach to the general management of the company that has enabled a planned approach to consistently improving the business in all respects. The results are improved business processes and Sales and Profit are on track for a YoY 100% increase.

## FINAL RESULTS

**100%**  
completion rate for monthly  
financial review actions.

Sales revenue increased by  
**>100% YoY.**

Profit increased by  
**>200% YoY.**

“The Team at The Symbiotic Group have helped make our processes and business model repeatable and predictable. We are so pleased about our progress and excited for the future.” [SMB business owner]