

# CASE STUDY

**Elevating growth:  
Our strategic blueprint and actionable  
steps improve the outlook for an  
established fintech business**

**Phase  
Three**

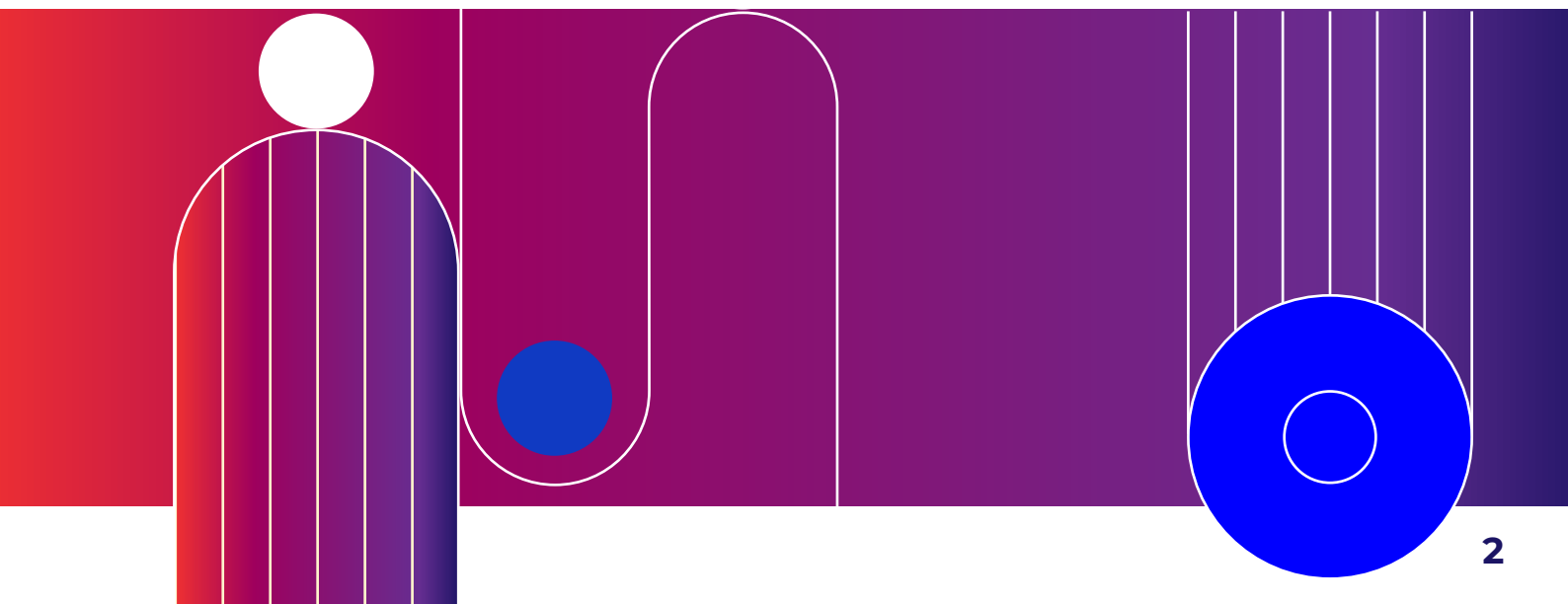
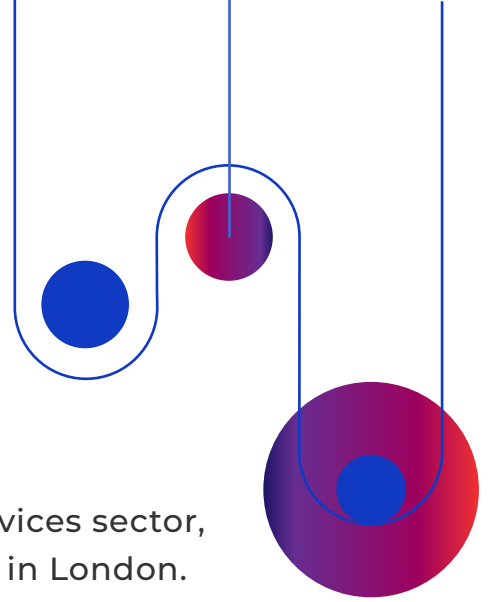
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# BACKGROUND

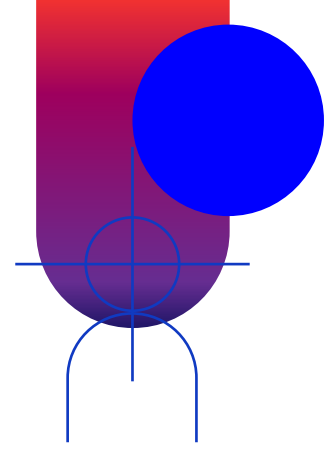
The business is a prominent player in the financial services sector, founded about 10 years previously and headquartered in London. Boasting impressive growth and profitability, the shareholders used our strategic blueprint to further elevate growth and best realise the assets they had created in the short, medium, and longer term.

The shareholder had initially commissioned our practitioners to deliver a strategic blueprint review to discover and assess the implications for the shareholders of devising and developing a “Grown and Sell” Strategy.

Our practitioners compiled a comprehensive 22 page summary report with actionable steps that detailed a list of key deliverables to support the “Grow and Sell” Strategy. It also included 10 critical actions that would be vital in enabling the shareholders to scale and sell the business in the short to medium term (3-5 years).



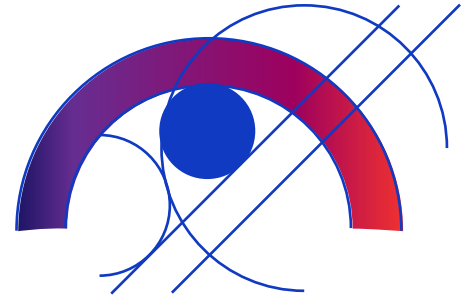
# THE PROBLEM



The shareholders had decided to adopt the key deliverables outlined in the “Grow and Sell” strategy. This was likely to present them with a range of challenges. These challenges may be significant and would likely to include:

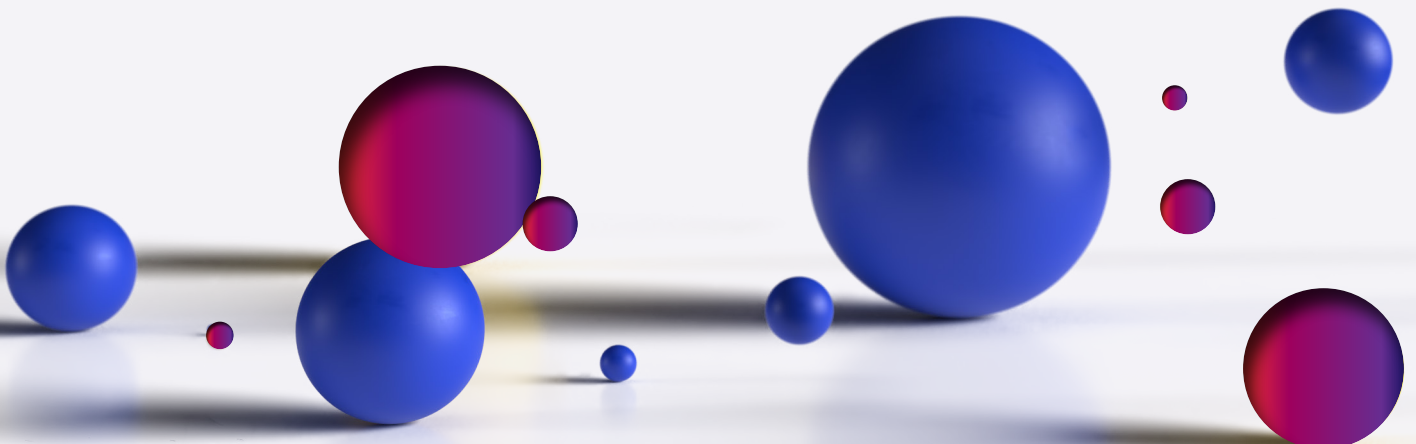
- Balancing the demands of scaling the business with day-to-day operations can be overwhelming and in particular the separation of executive and legal duties with operational responsibilities.
- Ensuring that both owners are aligned on the scale-up strategy and their respective roles. And maintaining the company’s culture and values as it scales.
- Developing the existing team’s skills and capabilities to meet increased demands and adapting leadership and management styles to accommodate a larger team and ensuring that internal processes are streamlined and optimised for scalability.
- Managing inventory, supply chains, logistics, and cash flow effectively as the business grows to ensure the “Grow and Sell” strategy initiatives are supported while meeting financial obligations.
- Continuously monitoring the market and adapting the business strategy to changing conditions and identifying and capitalising on new growth opportunities.
- Differentiating the business from competitors to maintain market share and developing strategies to retain existing customers, maintaining a high level of customer satisfaction as it scales.
- Staying up to date with changing industry regulations, compliance requirements and risk mitigation as the business scales in terms of customers, clients, and turnover.

# THE SOLUTION



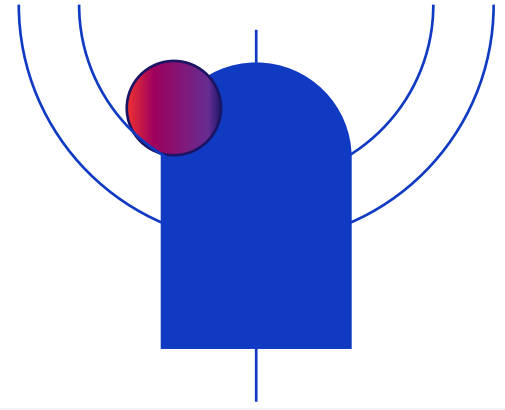
Addressing these challenges required a well-thought-out strategy, and it was agreed that our strategic blueprint and practitioners would collaborate with the owners and the business teams, providing advisory experience in scaling businesses. With that in mind the solution covered the following key activities:

- Practitioners to support the delivery of the strategy with subject matter expertise (SME) input on a retained basis with the option for the shareholders to utilise one or more of our experts in fractional roles for a pre-determined period each month.
- Our experts to support the delivery of the “Grow and Sell” Strategy by allocating 2 partners to attend the quarterly Board meetings, to review performance against agreed success criteria to ensure progress is in line with expectations.
- Practitioners to provide knowledge and expertise of the FX and Payments industry to ensure that key initiatives are supported and delivered within the timescales and criteria mapped out in the “Grow and Sell” Strategy.
- Our business team to provide a high-level input and considerations to potential investors and to provide ad hoc support Subject Matter Expertise (SME) support to any key strategic initiatives that support the overall “Grow and Sell” Strategy as required by the owners.



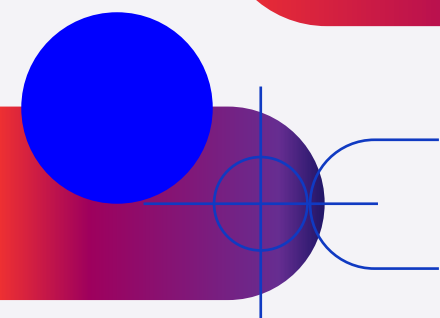
# THE RESULTS

## to date



Our industry practitioners have provided board advisory and SME services to the shareholders to ensure the “Grow and Sell” strategy is delivered within the timeframes:

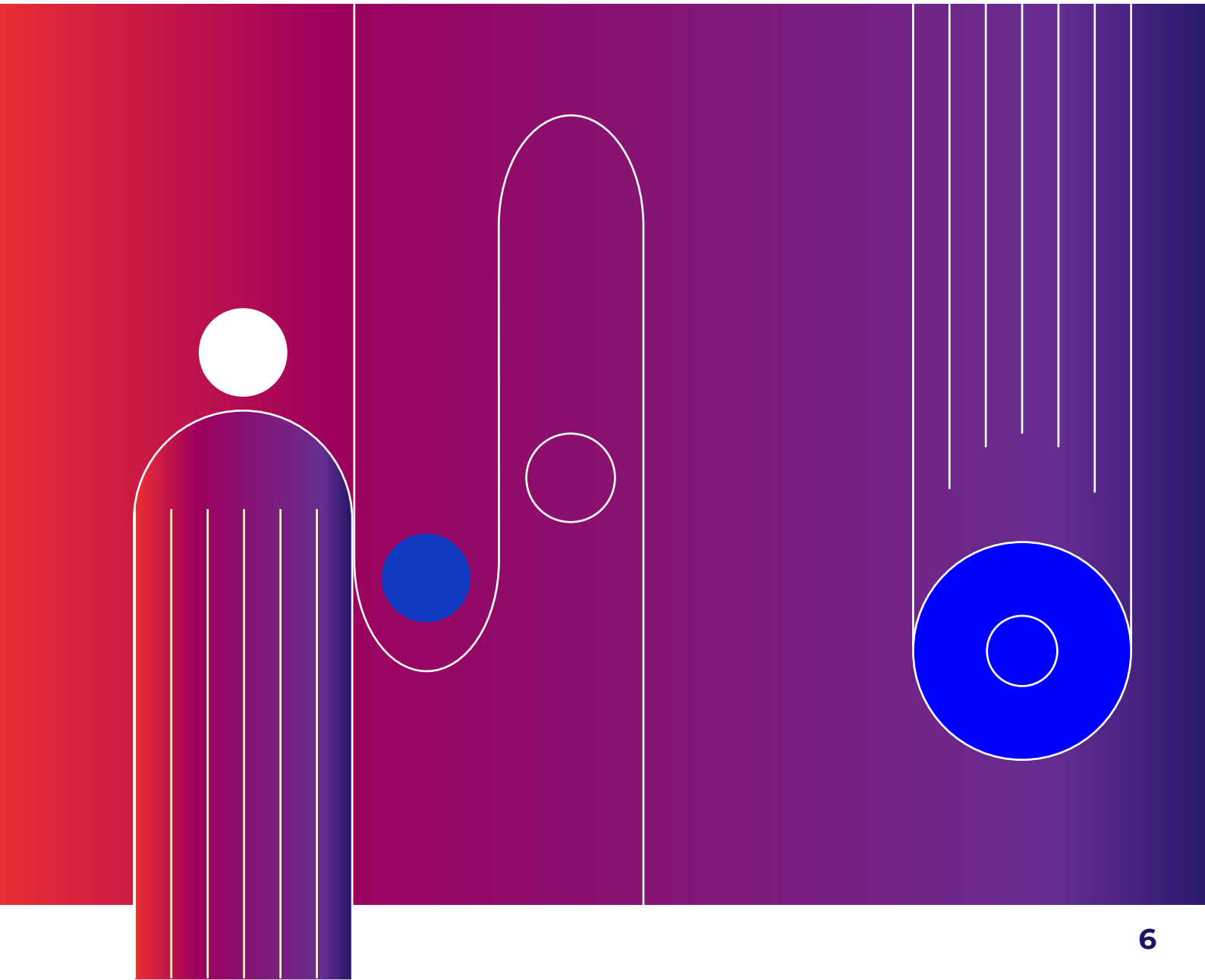
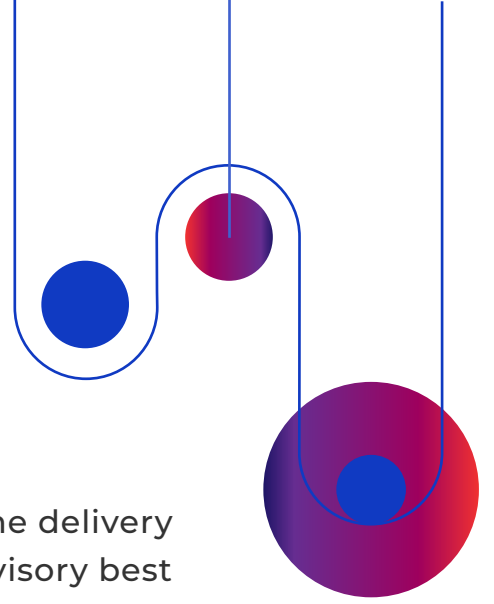
- Using our strategic blueprint, we have provided a framework for evaluating options and making choices that are aligned with the company’s long-term goals. This approach has helped the owners improved their decision-making and governance.
- Ensuring that all the product lines are priced competitively and meet the target market’s needs has helped the firm improve its profitability.
- Having access to accurate and timely financial data has improved performance tracking and has assisted the owners in making better decisions about where to allocate resources, how to price products and services, and how to manage risk.
- Setting actionable steps, clear short and long-term financial goals and tracking the progress has assisted in keeping the Grow and Sell strategy on track and has also seen an immediate impact on the firm’s profitability.



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# CONCLUSION

Our practitioners continue to support the owners in the delivery of the current “Grow and Sell” strategy with Board Advisory best practice and, subject matter expertise (SME) input. The aim is to ensure that the strategy remains on track from a time and quality perspective, utilising our strategic blueprint, practitioner experience, and wider network connections.



## CONTACT US

✉ [info@halconsultingltd.com](mailto:info@halconsultingltd.com)  
🌐 [www.halconsultingllp.com](http://www.halconsultingllp.com)

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### Office:

Suite 1, 7th Floor,  
50 Broadway,  
London,  
SW1H 0BL, UK