THE WORK IN PRACTICE

A three-year plan built on a restructured business

A national HR analytics firm brought genius grace in to restructure the business: three verticals, P&L clarity, and a three-year OGSM plan presented to shareholders.



SECTOR

For-profit technology, HR analytics

ROLE

Executive-in-Residence, then COO

01 SITUATION

The work was organizational: restructuring the business, designing three verticals, establishing P&L clarity, and prioritizing investment across product development, operations, and client growth.

The firm engaged genius grace for depth in program design, evidence-based practice, operations, and P&L, and for a record of building organizations, growing them, and finishing what gets started.

THE SCOPE OF THE ENGAGEMENT

01
Restructure the business

02
Design three verticals

03
Establish P&L clarity

04
Build the investor schedule

02 WHAT WAS BUILT

A three-year strategic plan built on OGSM methodology. Market and customer analysis mapped the firm's positioning against where the HR analytics industry was moving. Three verticals and a P&L structure set how the business was organized.

An investor schedule tied strategic priorities to the scaling decisions they required. A prioritization matrix set the order of investment, and the plan went to shareholders.



INVESTMENT ACROSS Product development Operations Client growth

03 WHAT SHIFTED

$100K+

OPERATIONAL SAVINGS

The plan went to shareholders and guided operations for the year ahead.

01 A board-approved three-year plan that also guided operations for the year ahead.

02 P&L clarity that changed the staffing model, business outcomes, and partnerships.

03 An OGSM framework leadership used to make decisions as conditions changed.

Work with genius grace

Strategy, leadership design, and organizational structure, across the full system.

Strategic advisory	geniusandgrace.com/strategyandadvisory
Coaching	geniusandgrace.com/coaching
Leadership Labs	geniusandgrace.com/leadershiplabsandexperiences