

A Case Study in Result-Oriented Business Planning – AllPoints Research

The Challenge: AllPoints Research (then operating under a different name) was bought by Tara Olson and Sherrie Aycock in 1996. After a decade of working in their business, Tara and Sherrie found that they had reached their earnings goals, but were too involved in the daily minutia of the business and were hitting a ceiling relative to business growth. Tara and Sherrie approached The Lattitude Group with three overarching challenges:

- Increasing profit and revenue to break the earnings barrier.
- Moving away from the tactical, day-to-day office work.
- Shifting focus to new business development and customer relationship management, and away from running the business.

The Plan: The Lattitude Group worked with Tara and Sherrie to define their roles as business owners and to restructure their business in order to fit those roles. Their plan focused on:

- Strategic thinking
- Business planning
- Leadership development
- Business plan deployment with managers
- Ongoing business coaching to ensure plan execution

The Results: Tara and Sherrie saw a dramatic shift in earnings and time management within their first year of working with their plan, which resulted in:

- Increased sales and an increased profit margin, making them among *The Business Journal's* "Fast 50" for 2004 and 2005.
- Communicating the corporate vision and goals to the AllPoints staff and integrating it into the business' culture.
- Clear definition of their roles as shareowners, not just self-employed individuals or business owners.
- Refining the sales process to include strategic account management and a diversification of the client base, including creation and evolution of a sales department.
- Creation and implementation of a customer relationship management (CRM) plan.
- The creation of a new brand and marketing plan.

The process Tara, Sherrie and The Lattitude Group followed is one that can be customized for each individual and type of business. Contact The Lattitude Group today to find out how your business can attain the results it needs through a strategic thinking and business planning process.

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