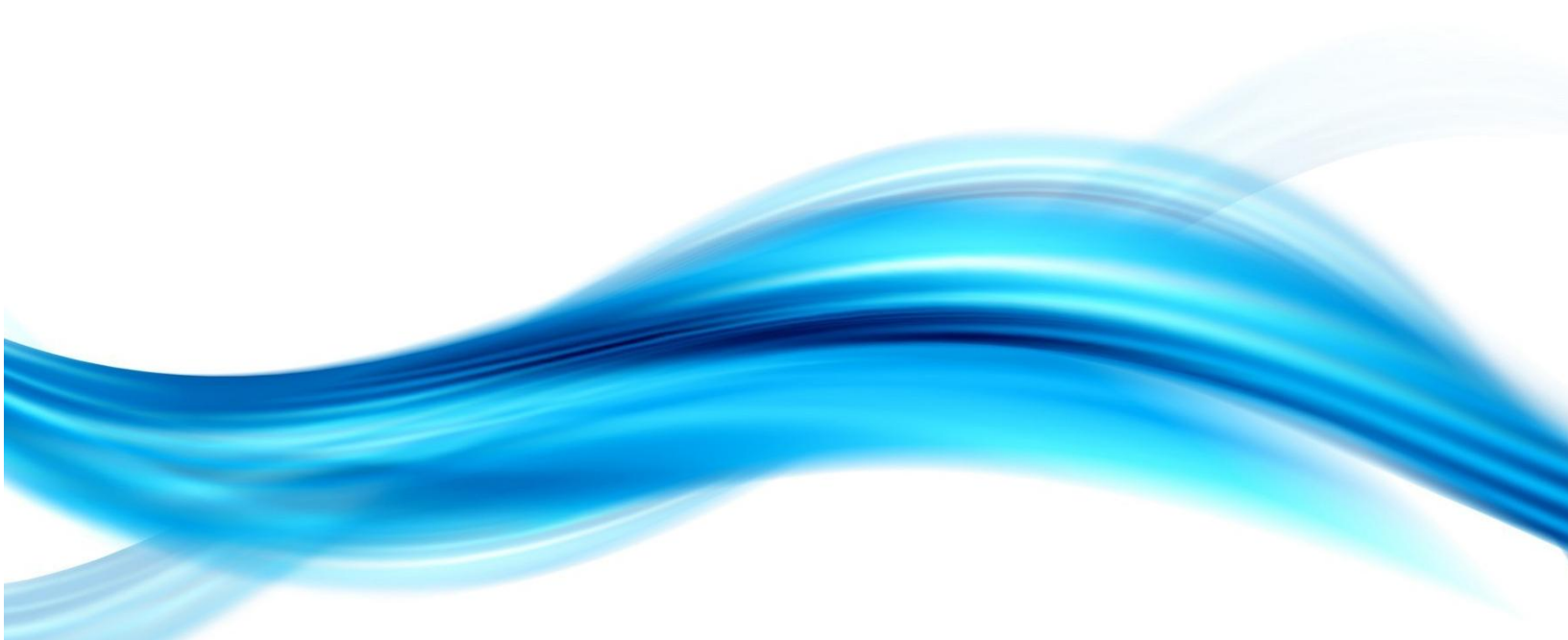


Executive coaching and succession planning.

We delivered.

A major financial markets firm, managing approximately \$1B wanted to ensure future growth by leveraging the unique skill sets of Partners and future Partners.



With a history of success and opportunity for immediate growth, a major financial investment firm needed to better utilize and join the skills of each Partner, to prepare for impending growth opportunities.

The Challenge

With a track record of success and a new fund on the horizon, a major financial market/private equity firm with approximately \$1B under management, needed a systematic, structured approach to investment and portfolio management.

Each of the firm's Partners had a specific vision and unique skill set. While this was an asset, it had also proven to be a challenge, preventing standardization and scalable processes. While the firm had been successful—and the team far from dysfunctional—the Partners did not feel that they were working as a congruent team. They also felt that leveraging their unique abilities would allow them to achieve specific objectives more efficiently.

The Process

With long-term growth in mind, the firm's Partners hired us to assess, streamline, standardize processes and develop the next generation of leaders.

At the request of the firm's principals, we conducted individual 360-degree assessments of each Partner. We identified specific areas of known value and areas that could be improved to produce worthwhile results.

We then assessed some of the firm's employees, and helped the Partners identify the next generation of future Partners within the firm.

The Solution

Individual coaching and significant consulting and advisement were essential to the success of the organizational development initiative.

We worked with the firm's Partners and employees to identify developmental processes that could be optimized to realize needed efficiencies and success.

In addition to structuring formal processes for the firm, we worked with the partners to help them better understand how their skill sets worked congruently with the skill sets of their fellow partners, and how with some relevant "tweaking," their unique individual skills could actually help create standardization.

We also launched a leadership development effort through intensive group efforts and individual coaching sessions to develop the necessary partner-level skills for the firm's next-generation partners.

The Results

The strategy and leadership initiatives are ongoing. The firm's industry success continues, with a promising round of upcoming fund raising.

The firm's portfolio companies continue to show success, and recent sales multiples have been above – and earlier – than projected..

You can learn more about us at: www.triangleperformance.com.



Sector: Financial Services, Investments

Solution: Organizational Development, Leadership Coaching

Challenge: Rapid growth, lack of unified leadership strategy.

Results: Developed processes to increase efficiency, initiated ongoing leadership development efforts.

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