

Case Study: New Business Consultants



Objective

Roger Boor, Principal of New Business Consultants, had no intent of realigning his business. Instead, he wanted to touch customers and partners and gather quantitative information on customer satisfaction. He felt he had a sense of his business and certainly what his customers – and partners – thought about his services. Said Roger, “I just wanted to confirm what I thought I already knew.”

Strategy

New Business Consultants engaged Kathy Klotz-Guest to design and conduct a survey of partners and clients for the company. Kathy went beyond the normal check-in questions as Roger describes it. “Kathy asked the HARD questions about how people really feel. “You need to make up a list of questions you are afraid to know the answers to, and go there. She did exactly that.”

Outcome

According to New Business Consultants, the actionable data about customers’ real needs and perceptions blew some assumptions away, as Roger puts it. “The trickle down of nuggets was that my idea of how we were perceived by others was almost entirely incorrect. I kept thinking, ‘we do all these other things’ and they see us as ‘X.’ Seeing those perceptions really changed my mind set,” he concedes. “Without Kathy’s help and this process, we wouldn’t know. The work we did with Kathy was the beginning of an important education after I thought I knew it all.”

New Business Consultants eventually shifted its business model and realigned its business based on a number of factors including the results of the survey, which pointed to clear customer perceptions, as Boor states. “We ended up with a major shift in our business model, and none of that starts without this process of research.” Today, the company is incredibly busy and business is growing. “We are on track to have one of our most profitable years,” says Roger. And he has advice for anyone looking to do customer research. “Be open to the process and to the information you receive. It’s an important strategic tool for any business. See it as an education and let the results take root.”

Story

Kathy then helped New Business Consultants create a ‘human’ story to tell about how they realigned their business and saw it grow. This wasn’t a Cinderella story. Their journey wasn’t easy and it was based on a lot of work. It was relatable, optimistic and real. “Kathy listened to us and our journey intently. She then crafted a human, compelling story based on our conversation that really captured the hard work and the risks we took embarking on this new direction,” recalled Roger. “I related the story of how we did the hard work – work we are still doing – to shift our model to our employees. They were inspired by our commitment, and in turn, motivated to participate. It was a story of effort; of not being sure we would succeed, of doing the real mindset change and taking some risks. Kathy highlighted the human element. We’re more than just a ‘finance and accounting solutions’ firm. We care about the success of our clients, too. What better “human” way to underscore our credibility as experts than by telling the story of our own financial journey as we re-shaped our business? Kathy helped us define and own that story.”

What can Kathy do for your business?

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