

STRATEGIC ASSIGNMENT CASE STUDY

Strategic Assignment for a family-owned air conditioning and refrigeration company.



PARTICIPANT CHALLENGES

The leaders of the organization came to The CPC Team with the following concerns:

- Revenue Volatility
- Cost and pricing misalignment
- Process improvement
- Leadership communication
- Training and career advancement for employees

ACTIONS TAKEN BY CPC

The CPC Team was engaged for a strategic assignment with two distinct tracts: 1. Family and Leadership alignment, and 2. A company wide organizational and process enhancement program.

AFTER WORKING WITH CPC

CPC assisted the client secure service agreements to stabilize revenue, introduce tiered pricing, and deployed digital scheduling to boost technician efficiency. In addition quality controls and training were implemented which reduced repeat calls.

Family and leadership clarity was defined for next generation leaders, with executive coaching. And a Family Operating Charter honoring the founder's legacy, was created to enhance conflict resolution.

Results: Family and Corporate culture was enhanced, while Service agreements surged by 42%, and Gross margins rose by 10%.