



Consultation Service: Core Corporate Documents

Does your company have a significant disconnect between the stated vision, mission, and values? Are those core documents outdated, too wordy, or irrelevant for day-to-day business operations? Has the company grown in the past few decades to where the core documents are no longer visionary and employees no longer resonate with the message? Do the bylaws, annual reports, and handbooks bring your core mission to life?

Core corporate documents – such as vision, mission, and values – are instrumental for your company’s strategy and operations, affecting everything from human resources and hiring to bonuses and expansion. Your company and employees may become complacent if core documents lack integrity, are not well-articulated, or are not a key component of daily communications, governance, and decision-making.

Components of Service

This consultation package can include the following services:

- Brainstorming sessions with corporate leadership to learn about the history and future of the company, discover key limitations and issues with current core documents, and identify aspirational elements that should be included in revised documents.
- Critical review of current core documents, including mapping of alignment and suggested edits for brevity and clarity. This iterative process may require multiple rounds of revision as other stakeholders are engaged.
- Focus groups, surveys, or interviews with key stakeholders to review messaging and ensure clarity.
- Written and electronic materials that explain and illustrate changes for company leadership and constituents, including “track-changes” documents and a slide deck presentation.
- Critical review of other corporate communications (internal and/or external) to identify areas in need of alignment and revision. This could include handbooks, newsletters, governance documents, annual reports, or other public-facing materials.

Your core documents should inspire, unite, and motivate. They should help shape the culture and drive decisions. They should be timely and relevant. Let Diligent Research & Consulting help you revise and create core corporate documents that move your company forward to success.

Pricing Options

Options available for hourly or project pricing.

Why Hire a Consultant?

What makes a consultant a good investment?

- Objectivity. A consultant begins the project with fresh eyes and a clean slate, viewing your core documents with neutrality and emotional detachment.
- Expertise. A consultant can fill gaps in staffing by providing a unique skillset or offsetting the burden on current employees. Engaging a temporary, highly skilled consultant is a cost-effective way to plan for the future, ensure long-term success, and positively impact the bottom line.
- Safe Zone. Corporate leaders often face challenging problems and need to voice frustrations and vision to an objective third party. A consultant provides a listening ear and an unbiased perspective that can help your company move from stagnation to action.

Portfolio Highlights

Foster Group (2021). Revised and aligned core business documents (e.g., Mission, Vision, Core Values). Reflected changes in new employee action attributes, shareholder materials, and CEO communications.

“We hired Diligent Research & Consulting to help us create alignment in our core business documents. I found Sarah to be a gifted listener who can ask the questions behind the question to get to the root opportunity. Not only did Sarah create alignment through our core documents, she created clear, concise, and compelling messaging that should carry the organization for another 5-10 years. Sarah is diligent, articulate, thoughtful, effective, and efficient, but what was most valuable to me was her passion for the work.”

▪ Buck Olsen, CEO ▪