



# Charter Solutions, Inc. Helps a Spin-Off Prepare for Growth

## CLIENT SUCCESS PROFILE

*Industry: Healthcare*

*Location: USA*

*Company Size: \$111 Million*

*Engagement: 8 months*

*Capabilities Applied: Management Consulting, IT & Business Governance, Portfolio Management*

*“CSI continues to provide high quality, engaging consultants that jump right in and make a significant difference in their assigned work. I have been a fan of Charter for many years now and with each company that I engaged with, I looked to Charter to assist in the process.”*

### INTRODUCTION

A CEO of a healthcare managed services organization in the US recently shared these words of appreciation after a consulting engagement. Initially brought in to develop and operationalize a governance structure across business lines and Information Technology. The engagement quickly turned into multiple workstreams moving into areas of management consulting and business development, working directly with the CEO in a Chief of Staff type role to establish clear goals.

### CHALLENGE

This for-profit division of a non-profit healthcare system was in the process of establishing themselves as a national provider of services (third party administrator). As a start-up, the customer was in the process of marketing to a potential client base while also building the organization. The following business problems were identified, and plans developed to align the organization:

- ▶ A new leadership team being formed brought in new, diverse skills and ideas.
- ▶ Too many stakeholders wanted to engage at too detailed of a level without a platform for collaboration and a shared understanding of success.
- ▶ Other organizational assessments and action plans had been completed in the past resulting in small to little forward movement.
- ▶ Other vendors in-house, addressing technology, business development and organizational structure, were often tripping over one another and duplicating work.

And while the organization was forming, prospective clients were requesting proposals, pricing and structure. Delivering to the prospective clients was difficult with the lack of organizational alignment and process putting the organizations growth at risk.

### DIRECTION & APPROACH

With new leadership and major investments being made in people, process, and technology, there was renewed energy to build a common path forward for the business. The following became areas of focus during the engagement:

- ▶ Governance structure
- ▶ Portfolio management
- ▶ Business development
- ▶ Technology organization structure

*“A five-star rating”*



The Charter consultant working alongside the CEO and leadership team was able to put in place a plan of action with defined roles and responsibilities.

## THE SOLUTION

- ▶ Engaged with the customer as a member of the CEO's Leadership Team to build rapport to ensure the approach and solutions fit the customer's needs.
- ▶ Quickly established governance charters and structure to establish awareness across the organization with the understanding that the governance models would evolve and improve over time.
- ▶ Collaborated across departments to identify key programs and projects aligning with the organizational goals and strategy. Developed format for review via the governance structure.
- ▶ Collaborated with Human Resources and Information Technology to develop future functional and reporting organization structure.
- ▶ With the departure of the Chief Growth Officer, worked directly with the CEO on business development materials and processes including staffing plans, marketing materials, presentation packets for prospective clients, and RFP responses.
- ▶ Consultant given oversight of other vendors by CEO which led to a focus of efforts and defined scope for vendors.

*"... provided professional and industry-leading program management – met all deliverables and timelines, exceeded expectations, and worked effectively with all leadership and staff."*

## END RESULTS

Benefit Realization occurred within the first 2 months of engagement. As the engagement continued, value was consistently delivered transforming how the organization worked with internal and external customers. A few of the benefits included:

- ◆ Through the newly formed governance committees, buy-in and alignment on deliverables, approach, timing and resource needs for key programs and projects was established. This resulted in a reduction in the portfolio of active projects, which enabled the team to focus on projects that aligned with company goals.
- ◆ An enhanced focus on client engagement resulting in securing first client.
- ◆ An agile, reusable quick start process was developed for first client resulting in requirements and implementation workshops that met regulatory timelines.
- ◆ Information Technology organization structure approved, and positions established to support the growing organization.

## ABOUT CHARTER SOLUTIONS

Charter Solutions delivers business and technology consulting services that help companies we partner with harness the power of data, analytics, the cloud, and application development to improve business outcomes. Our multi-industry experience allows us to uncover new solutions and guide clients to the best-fit application of technology to meet their goals.

## CONTACT INFORMATION

### CHARTER SOLUTIONS

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