

## **KEY ACCOMPLISHMENT SUMMARY**

---

Alex A. Pilkington

### **Scalable Business Model Strategy Powers Rapid Sustainable Growth.**

#### **Situation:**

Wealth Protection wanted to expand operations nationally but was hampered by an outdated infrastructure, lack of a formalized operating model and the resources needed to achieve their goals.

#### **Goals:**

Design multiyear corporate strategy to achieve national expansion vision. Create an IT Transformation strategy to drive and support corporate strategic objectives.

#### **Action Plan:**

- Led the leadership team through a series of exercises to fully vet expansion concept, identifying SWOT, risks and skill gaps required to accomplish the goals.
- Retained financial consulting firm to analyze financials, develop IT investment model, perform a ZBB and expansion costing model aligned to multiyear strategic roadmap.
- Conducted current state assessments, performed industry/competitor research, developed gap assessments, and designed target state business operating models. Identified risks to long range strategic plans and developed mitigation strategies. Presented multiyear roadmaps to leadership team.
- Identified high level value streams and strategic capabilities and prioritized based on strategic importance, maturity and financial impact analysis.
- Retained compliance auditing firm to begin building GAP assessments and best in class solutions for achieving HIPAA, PCI-DSS & FINRA compliance and controls.
- Analyzed current product line, services, sales and fulfillment metrics.
- Retained market research firm to perform competitive, market, customer, capability and product analysis of key targeted locations.
- Identified A\B\C players, built performance frameworks to discover unique staff abilities. Leveraged and aligned skills to objectives and elevated players or realigned as necessary.
- Designed an IT Strategy leveraging SaaS to provide scalable model to meet demands of staff expansion and rapid site deployments. Vendor has capacity to provide IT services, support & administration for the SharePoint, CRM and GP products utilized.
- Provided thought leadership to leverage inorganic growth opportunities (M&A, JV or Strategic Partnerships.)
- Provided thought leadership for Market expansion strategy.

#### **Results:**

A new business & operating model enabled successful expansion of six new facilities in four states in three years. Additionally completing one merger and three strategic partnerships provided quick region expansion as well as adding to the products and services offered and broadened the client value delivery model. Through the use of IT enablement each business unit was now capturing and using critical intelligence to drive higher client engagement, market reach and for drastically reducing the sales cycle by 77% enabling the firm to quadruple in size, triple revenues and double profits.