

ESG MODEL CASE STUDY

We are delivering project results through our project management and organizational leadership best practices and tools.

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OBJECTIVES

Our client, an investment consulting firm focusing on non-profits, is helping their clients find investments in alignment with their values. As such, developing their own proprietary ESG model based on specific ESG data was a critical success factor to delivering this investment analysis to their clients.

The firm's core competencies lie in investment research and analysis. With this new project, their administrative team needed project management training and implementation support.

SOLUTION

The firm identified their in-house resource to lead the project and paired him with Belinda DiGiambattista to train him on project management and leadership best practices. They co-led the project through the business analysis, requirements, use cases, and test phases and the creation and management of documentation and the project plan.

The company successfully launched their first version of their proprietary ESG model to their investment team and now have new capabilities and analysis to share with clients related to the managers with whom they invest.

BENEFITS

1. New competencies and capabilities

This in-house resource can now use these new skills on all the new projects they launch at the firm.

2. Improved communication

The business and the software development teams have the tools in place to experience the necessary communication to make their projects successful.

3. Unique ESG offering

Our client has a unique ESG model that no other investment consulting firm has and can provide insights into the ESG nature of the managers with whom they invest.



AT A GLANCE

CHALLENGES

- The need for new skills
- Communication gaps between teams
- The need to launch proprietary tools

BENEFITS

- Unique value proposition with their ESG model
- Growth in talent skillset that can be broadly applied to new projects



BELINDA DIGIAMBATTISTA

CEO Choose Your Metric

"For over 7 years, our company has been improving our clients' abilities to focus on their mission, the work that matters most, through coaching and consulting in the areas of leadership, accounting, operations, and human resources."

LEADERSHIP CASE STUDY

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OBJECTIVES

Our client, a private biotechnology investment fund, was growing quickly and seeking to improve their leadership and culture to retain the top talent they have attracted.

Their team included some team members who had never managed employees before and were being promoted. Additionally, it was a fast growing company that had a demanding work environment.

SOLUTION

In order to bring transparency of the various leadership styles to the senior leaders of the firm and to the managers themselves, our firm conducted 360-degree reviews for all managers including the CEO. As a certified social and emotional intelligence coach, Belinda DiGiambattista used a behavior based assessment tool that also includes a few free-form questions to gather the feedback on each leader.

The information was analyzed and summarized, and Professional Development Plans were created for each manager that illustrated where they saw themselves compared to where others saw them. The analysis included information regarding their strengths, areas of improvement and next steps.

BENEFITS

1. Transparency and new information

Each manager received insights on where they can improve their own leadership and positively contribute to the company culture.

2. Improved company policies

Senior leaders identified gaps between core values, policies and training needs and were able to make changes.

3. Professional Development Plans

Each manager was provided with a roadmap of how their strengths and weaknesses play off one another and next steps to improve as leaders and managers.



AT A GLANCE

CHALLENGES

- Needed to train their leaders and managers.
- Needed to match values and policies.
- Needed to retain talent to execute on big goals.

BENEFITS

- Behavior-based 360 degree reviews provided insights for improved leadership, the management of the overall culture, and the insights to retain talent.



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ACCOUNTING OPERATIONS CASE STUDY

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OBJECTIVES

Our client, a food service company, experienced employee theft and needed a fast analysis of the extent of their losses. Additionally, they needed to enhance their accounting operations in order to better protect their cash assets and manage the profitability of their company. They also needed to file timely and accurate sales tax and income tax returns.

SOLUTION

A multi-pronged approach was used to approach the issues our client faced. They needed multiple solutions at the same time. We provided forensic accounting analysis on checking account data, PayPal data and Stripe merchant account data. We also performed a smooth migration from a QuickBooks desktop (a server based system) to QuickBooks Online (a cloud based system.)

Immediate steps were taken to account for all losses in an organized manner that was ultimately used to provide evidence to the DA's office for prosecution. We also began a hefty accounting data clean up effort that touched over 10 systems of source data. We conducted quality control in comparing previously filed sales tax returns to their accounting system sales data and found discrepancies that needed correcting.

BENEFITS

1. Evidence for a grand jury

The analysis was used to indict the employee who transferred a large sum of money to their own accounts.

2. Clean, accurate P&L and B/S

The company knows how much money they are actually making for the first time with accurate financial statements.

3. Ability to make business decisions

With insight into their monthly cash flows and a revised chart of accounts that properly categorizes their revenue and expenses, they can make confident business decisions on investments and growth.

ACCOUNTING INFORMATION SYSTEM

AT A GLANCE

CHALLENGES

- No insight into their financial position nor profitability.
- Susceptible to the risk of employee theft.
- Late tax filings and mis-matched info.

BENEFITS

- Ability to make sound and confident business decisions with new insights into their business' financial health.
- Meticulous analysis for use in seeking retribution for stolen money and creating a more secure system.



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