

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.