

PROPELLING CLIENT PERFORMANCE AND SETTING THE ESG INDUSTRY STANDARD

Leveraging data from disparate systems enables unique insights and proprietary offerings.

WHO NEEDED HELP

A mission driven investment consulting firm is helping non-profit clients find investments that align with their values by developing their own proprietary ESG model for manager analysis.

HOW WE HELPED

Together we identified their in-house Lead 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.

The firm successfully launched 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.

WHY THIS WORKED

1. New competencies and capabilities

In-house Lead has new skills to deploy for the firm.

2. Improved communication

The business and the software development teams now have seamless communication in place.

3. Unique ESG offering

Our client has a proprietary ESG model expanding their unique value proposition.

CASE STUDY



AT A GLANCE

OBJECTIVES

- Train Managers with new skills
- Eliminate communication gaps between business and IT teams
- Launch proprietary tools to add to the firm's offering

BENEFITS

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

CLIENT TAKEAWAY

"One of the things that impressed me most about Belinda was her ability to blend in seamlessly with our organization. She took the time to get to know our team, and her approach was collaborative and inclusive.

She is an expert in her field and possesses a wealth of knowledge and experience that was invaluable to me. Her approach was customized to our organization's needs, and she was always available to answer questions and provide guidance whenever we needed it.

Her deep understanding of project management best practices, combined with her ability to blend in seamlessly with an organization, makes her an ideal partner."

Daniel J. Baptiste, Director, Investment Consulting