

Case Study - Association & Membership Organization

Leadership / Organizational Assessment, Recommendations & Implementation



Business Challenge:

- An association and membership organization (approximately 70 total employees) hired a new CEO in early 2022 tasked with leading the organization through transformational change and growth over the next three years
- Peak was engaged to assess and provide recommendations around the current organizational capabilities and to determine if the leadership structure, people, process and technology could support the new strategic direction

What we Did:

- Conducted a series of Leadership Team stakeholder interviews
- Provided a comprehensive report of interview findings and recommendations related to organizational structure, culture, people, process and technology
- Developed several job descriptions for new leadership critical management positions
- Supported change and communication activities around the implementation of a new leadership team structure (org charts, board / employee email communications, all hands presentation, leadership talking points, etc.)
- Supported detailed organizational design efforts specific to the Sales and Product organizations (clarity around department fiscal year strategic priorities, organizational structure recommendations, rationale for changes, job descriptions)
- Built executive dashboard for Leadership Team to report on revenue / strategic priority status to CEO

Result:

- Initial phase of Leadership Team changes were implemented immediately following Peak's findings / recommendations
- Very positive response from Leaders and staff regarding Leadership organizational changes driving role clarity and organizational accountability
- Presented detailed organizational design recommendations for critical Sales and Product organizational functions