

TREXIN CASE STUDY

RENEWING THE VALUE OF A NON-PROFIT ASSOCIATION

Trexin helped a 90-year-old non-profit association develop an actionable plan for transformative change.

BUSINESS DRIVER

Our Client, a non-profit association representing a prominent group of physical science organizations, had recently completed a Board-level review of its mission and defined a set of transformative goals and associated strategies to revitalize its delivered value within 5 years. Seeking a management consulting partner through a competitive request-for-proposal process, the association's officers selected Trexin to lead their organization through a highly collaborative effort to interpret, refine, and execute the Board's strategy.

APPROACH

Our approach followed Trexin's Strategy, Assessment, and Roadmap (STAR) methodology, a framework for strategy execution that readily built upon the Board's prior work. Accepting the CEO's challenge to involve as many staff as possible to drive a shared vision for the whole enterprise that moved beyond the more isolated product-oriented mindset of the past, Trexin actively engaged more than 30 stakeholders in full-group discussions.

In the first phase of the engagement, Trexin led a series of 8 half-day workshops spanning a 12-week period, starting with extensive brainstorming sessions to expand each strategy into possible tactics. With more than 600 tactical ideas offered, Trexin then introduced prioritization, consensus-building, and selection techniques to focus the group's path, ultimately arriving at a set of 42 consolidated tactics. Trexin then led the team to expand the selected tactics into future-state capability needs (expressed in terms of people, process, and technology dimensions), mapped against a newly created capability model for the enterprise that Trexin also introduced. The large-group workshops concluded with a further elaboration of the future-state vision in terms of the categorical customer need states that the association's products/services could satisfy, enabled by the future-state capabilities.

In the second phase of the engagement, which was conducted over an 8-week period that was conducted entirely remotely due to the COVID-19 pandemic, Trexin worked closely with the leadership team to validate the capability model, conduct a capability readiness assessment (i.e., gap analysis), translate the gaps into capability enhancement projects defined by individual project charters, and organize the projects into a 4-year transformational roadmap.



RESULTS

The Board's goals and strategies to drive transformative change within 5 years was successfully translated into an actionable plan consisting of 9 capability enhancement projects to be completed over a 4-year period, guided by a 2-level capability model.

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