



THE
POIRIER
GROUP

Case Study

STRATEGY DEVELOPMENT FOR HEDGE FUND

Company Background

The client specializes in credit and opportunistic investments, including financing and restructuring solutions for mature private equity funds. They were struggling to achieve positive margins due to high operational costs, slow decision making, and non-value-add activity.

Benefits

\$1M

found in annual
operational savings

- Created Role alignment and accountability
- Strategic direction established

PROBLEM

The company grew too quickly, doubling their assets in a short amount of time— leading to unclear roles amongst the leadership team. The team thus felt unclear on the strategic direction of the company. The engagement started out as an IT development to capture domain knowledge from the Chief Risk Officer and his strategy on how investments work - **this quickly turned into a strategy, leadership and roles & responsibility exercise.**

APPROACH

- **Strategy Development** – Creating full strategic goal setting and team alignment
- **Operational Development** - Redesigned complete operating model, improving operational readiness
- **Accountability** – Defined alignment and accountability for executives; improved communication across the leadership team, breaking down silos between functional groups
- **Roles + Responsibilities** - Created proper investment, onboarding, allocating capital, investor relations
- **HR - Organizational** - Created 3 new roles - (operations specialist, product manager and product specialist)
- **IT Strategy** - Realigned work effort for optimum value using 3rd parties for greater analytics