

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 nonvalue-add activity.

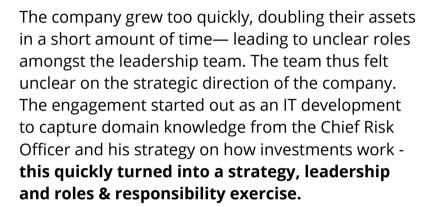
### Benefits

\$1M

## found in annual operational savings

- Created Role alignment and accountability
- Strategic direction established

### **PROBLEM**



#### **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



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