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Case Studies

Financial Services

BANK REGULATORS

Challenge: Large Loan Portfolio Defaults
Issue: Valuation and disposition strategy in declining market
Resolution: Determined the Values, developed the workout/disposition program and in some cases secured the buyers.
Other Work: Provide investigative, market and financial due diligence for specific Institutions; lead teams of attorneys, accountants, and consultants to close down financial institutions at time of takeover.

LARGE PRIVATE INVESTOR

Challenge: Large Residential Loan Portfolio
Issue: Fluctuating market conditions for sell/hold strategies
Resolution: Evaluated the assets and recommended staged strategies for Sell/trade/hold. On-going monitoring.

MAJOR RETIREMENT SYSTEM

Challenge: Develop Operational Benchmarks to Evaluate Property Managers
Issue: Large group of Managers who had not been evaluated by a new process
Resolution: Provided original benchmarks with independent scoring to evaluate managers on several financial and operational levels. Methods were used to evaluate other companies beyond the Pension Fund.

MAJOR INTERNATIONAL BANK

Challenge: Major developer/client defaulted on multiple loans
Issue: Bank needed development and financial strategies for disposition and on-going management assistance to work out the large California development project.
Resolution: With well-documented market research and financial scenarios, we assisted the Bank in stabilizing the development for disposition.



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Corporate Sector

FORTUNE 500 COMPANY

Challenge: Multiple Global Account Teams Required Sales Direction
Issue: Sales teams changed and required accountability and strategic planning to achieve goals established by company.
Resolution: Led three- to five-day global account planning sessions to help teams develop business plans. The program led to defined sales goals and tools to measure quarterly and annual progress.

STARTUP TECH FIRM

Challenge: Strategy to raise capital in difficult economic climate
Issue: Business needed to raise seed capital, angel, and venture funds
Resolution: Prepared annual business plans, developed the strategy and raised funds through a well-defined network. Streamlined the organization resulting in profitability.

INTERNATIONAL OFFICE DEVELOPER

Challenge: Strategy to expand to technology markets in United States
Issue: Company needed a decision matrix to determine optimum sites for expansion
Resolution: Through extensive research, analysis, and documentation, we prepared a decision matrix outlined multiple variables for expansion.



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Public Sector

FEDERAL AGENCY

Challenge: To determine the viability of a headquarters relocation
Issue: Cost and expense of new facility plus effects of move on employees
Resolution: Prepared detailed market and financial analyses and review of relocation effects on employees. City provided some funds for move and impact on employees was minimal.

FEDERAL AGENCY

Challenge: To determine potential administrative offices for expanding agency
Issue: Use of evaluation criteria measured by rank and score of multiple variables
Resolution: Rank and score of variables led to decision matrix for agency office locations.

STATE PUBLIC FUND

Challenge: To Prepare a Living Document for Policies and Procedures
Issue: Fund needed an ongoing process for Policies and Procedures that could be managed and updated as needed.
Resolution: Prepared a comprehensive manual for Executive staff.