

The Learning Plan

# Case Study



Vision, values, and the hard work of getting four partners moving in the same direction

<b>INDUSTRY</b> Renovation & Millwork	<b>DURATION</b> Ongoing	<b>ENGAGEMENT</b> Advisory & Fractional
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## The Situation

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A custom cabinet and millwork renovation company was run by a founder and three brothers, each responsible for a vital part of the business.

The company had real craft credibility and a loyal client base — but no shared direction, no documented processes, and no formal framework for making business decisions together.

The family dynamic added complexity. Four stakeholders with different operating styles, different priorities, and a shop culture where change didn't come easily.

Processes, where they existed, lived on paper printouts in folders that got lost. The web presence didn't reflect the quality of the work. And year-on-year, the company was making decisions reactively rather than strategically.



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## The Work

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### STRATEGIC FOUNDATION

The most important work here was helping the ownership group get aligned — on where the company was going, what it stood for, and what success looked like year by year.

- Facilitated the identification of a clear company vision and defined values that reflected how the founders actually operated
- Established an annual goal-setting cadence — narrowing focus to achievable, prioritized objectives rather than a broad wishlist
- Served as an ongoing sounding board for the CEO on key business decisions — trusted enough to speak plainly and challenge assumptions

### MARKET PRESENCE AND BRAND CREDIBILITY

- Standardized the web content to accurately reflect the quality of the work and the company's positioning
- Coordinated professional photography — giving the company visual assets that matched the calibre of their craftsmanship

### OPERATIONS AND TECHNOLOGY

Processes moved from physical paper in folders — frequently misplaced in a busy shop environment — to a digital system accessible to every team member.

- Documented and digitized internal processes across the business
- Evaluated and piloted new technology tools — selecting only what fit the organization's actual culture and capacity



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## The Outcome



The team refers to this engagement as having a “business coach” - someone who helps hold the strategic thread across years, not just within a single project.



A company with strong craft and a complicated ownership structure now has a shared direction, a cleaner market presence, and systems that don't depend on institutional memory stored in folders.

Perhaps more importantly, the CEO has a trusted external voice for decisions that benefit from a perspective outside the family dynamic.

Disciplines: Strategic Advisory | Vision & Values |  
Annual Goal Setting | Brand & Web | Process Documentation |  
Technology Evaluation | Organizational Culture

