

## Service Snapshot: Current State Health Check

This review enables the leadership team to gain a shared perspective of where they are, how they got there and the threats and opportunities that lie ahead and how they can take advantage of change.

### Challenge

Leadership teams need to ensure that they understand the complexity of the issues facing them in a number of different situations:

- When they sense change but do not have a handle on external forces that they know are happening because they do not have the capacity to assess them or the risk/opportunities
- When they might be facing some very real problems in terms of staff issues, strategic direction, operational issues.
- When they are subject to prospective take over or themselves want to acquire or merge with another organisation (and need better to understand their own culture and strengths and weaknesses)
- When they are wanting to and likely to grow but would benefit from a clearer vision of themselves in order to move forward

Whether this is required across the whole organisation or for specific parts of it, it is important that whilst the review has to be thorough it should be of relatively short duration, so it is vital that it focuses on key issues.

### Solution

Whilst all organisations are different and no single approach will work in all situations, there are a number of processes and systems which are vital to accelerate and sustain current and future performance.

The Penumbra Current State Health Check is designed to provide a Board

or management team, through an independent and objective review, with a clear understanding of where they stand today, what they do well and what they could do better and what actions they should take. It also identifies what is happening in the client's world, what impact this might have on their future aspirations and what they should do to take advantage of changing circumstances.

Our review can be undertaken as a stand-alone exercise or as the precursor to a strategic review with a view to refining an existing strategy or developing a new one.

Our systematic approach is designed to be light on your peoples' time through the use of a mix of desk research, electronic diagnostic tools and qualitative research methods.

Depending on the nature and scope of the project our review would investigate a range of activities:

#### Strategy

Shared vision for the future  
Strategic and operational plans  
Organisation structure

#### People

Leadership and communication  
Culture, values and behaviour  
Stakeholder engagement  
Knowledge, skills and competencies  
Appraisal and reward

#### Governance

Board structure, balance, roles, responsibilities, committees, service contracts and management  
Risk and performance management  
Policies and codes of practice  
Knowledge management and practice

Decision implementation and management feedback

#### Business development

Marketing and innovation  
Sales and order fulfilment  
Customer service

#### Operations

Processes  
Technology  
Licence to operate

#### External

Reputation perceptions  
Political, economic, social, technological, environmental and legal issues  
Social responsibility  
Regulatory requirements  
Human rights

#### Financial performance

Analyst review

### Benefits

- Comprehensive assessment of both the current state of the organisation or parts of it
- Identifies what is done well and not so well and what action is needed
- Assesses implications of external change and ability of organisation to take advantage of this
- Addresses the intangible as well as the tangible aspects of organisation
- Ensures Boards really understand risks that they are managing
- Identifies how best to invest for the future
- Drives sustainable, continuous performance improvement

## strategy people performance

Penumbra is a strategic business consultancy. We bring clarity by using research to drive understanding and direction. We deliver success by balancing experience and innovative thinking.

Whatever your aspiration, we'll provide the tools, information and analysis to turn your strategy into operational reality, in a way that motivates your people to outperform the market.

### Overview

Our expertise lies in helping our clients to execute robust strategies and deliver results.

We achieve this by combining a robust management planning system with a focus on people which drives alignment and commitment

We work in partnership with talented and committed leadership teams to help organisations build corporate value with a wide range of customised, cross-functional advisory programmes and services delivered from four complementary service groups:

### Strategy

(Development, formulation, implementation and alignment)

Our innovative **Penumbra Balance** approach creates dynamism, drives and sustains momentum and makes strategy real for stakeholders

### Organisational Development

(Behavioural issues)

We call our holistic approach **Balanced Motivation** which encompasses activities that improve performance both for the organisation and the individual

### Research and Insight

Our stimulating **Clarity** approach draws on our business consulting skills to deliver a mix of business analysis and market research which provides compelling insights for winning decisions.

### Operations

The Operations group brings all of our hands-on practical experience to bear on execution and delivery of results.

Our technology enabling approach called **Totality** facilitates business focussed services and solutions, aligned to business needs, for people, processes and tools.

### Why Us?

Organisations turn to us when they:

- Want to find a new strategic direction
- Have created a strategy and now need to execute it
- Need to drive more value from existing initiatives
- Have a big issue to resolve, usually dependent on lasting employee buy-in
- Need to explore new ways to drive value
- Need a breakthrough result
- Are seeking measurable results

### Our Experience

We have real world experience spanning 20 years with our clients. This includes working with:

BP, Citibank, Morgan Chase, WestLB, RBS, UBS, Bankers Trust, Kleinwort Benson, Coutts, Natwest, Intel, Nokia, Adobe, Kall-Kwik, Glaxo Smith Kline, Dupont, Pfizer, Savills, British Council, Clifford Chance, British Airways, Gillette, Unilever, Shell, Volvo,

Vauxhall, British Gas, TradeStation, MWB Business Exchange, Investors in People, University of Cambridge

On projects such as:

Strategic Planning, Strategy development and implementation, Culture change, Post-Merger Integration, Vision, Purpose and Values, Current State Analysis, Organisation Re-design, Transformational Change, Client Focus Strategies, Perception Studies, Client and Staff Engagement surveys, Global Rebranding, Know your Customer, Market Forecasting, Consumer Insight, Market Segmentation, Process optimisation, Lean/Six Sigma, Project Management, ERP Systems Roll-out, Market Research, Financial Modelling, Franchise Start-up Evaluation models, Cost Benefit Analysis, Implementation Alignment, Strategic Alignment, Complex Database development, Custom Application development, Supply Chain Optimisation

Covering diverse sectors such as:

Financial Services, Pharmaceuticals, Manufacturing, Energy, Mobile Telecoms, Travel and Tourism, Aviation, Property, Hi-tech and Business Services