



## KLR Consulting

Inspiring Success in Your Leaders and Teams

### Social Tribe Success Story

"After two years in business, Social Tribe was doing great," explains Megan Conley, Founder and Principal of the social media marketing company. "We had a nice stable of clients and the capacity to service them with quality deliverables, but we were operating without a clear understanding about where we were heading as a company." Conley found that much of her time was spent reacting to situations, rather than focusing on the company's future strategy – a common situation in many startups. Conley continues, "I felt as though I wasn't in the driver's seat anymore."

#### Challenges for a Growing Business

Conley employed one person, who was a valued collaborator with senior-level skills, and she hoped to bring on employee #3 in the coming months. As Principal, she also managed consultants that were used as a resource for some of the company's engagements. "Owning a business is not just doing the work," says Conley. "You also have to manage everything from invoicing and time tracking to employee development and allocating workload. Without a solid plan and vision for what the next two years look like to back that up, it's all just a crap shoot."

#### A Clear Plan for the Future

After Conley described her challenges to a trusted colleague, she was introduced to Kristi Royse of KLR Consulting. Conley recalls her first conversation with Royse, "She was very reassuring and explained that it was common for startups to find it difficult to move past their first phase of growth. She started discussing how she could help the company move from a tactical way of thinking to a more visionary mindset quickly and without disrupting the business." Conley also wanted help delegating some of her power and having a more team-based approach to managing the daily business.

Royse recommended a Strategy Retreat with Conley and her employee, but started by interviewing each of them in order to understand the current situation and develop the priorities for the retreat. "KLR was able to bubble up the issues in these conversations with very direct questions," recalls Conley. "The interviews included discussing touchy subjects, but the calls were kept very positive. I was glad that the tone on the calls and at the retreat never became discouraging." KLR was able to accomplish these interviews in one-hour phone calls, working around everyone's schedules.

#### Social Tribe

**Industry:** High-Tech

#### Challenges:

- Unclear and outdated strategic plan
- Growth opportunities not identified
- No clear direction or career path for employee
- Unsuccessful attempts at new hire
- Outdated company mission statement and values
- Constantly reacting to situations, rather than executing plan

#### KLR Solutions:

- Startup strategy retreat

#### Benefits of KLR Programs:

- Developed company strategy in one-day retreat
- Successfully hired new employee
- Identified new growth opportunities
- Updated company mission and value statement
- Clear understanding of each person's strengths and weaknesses
- New hire resulted in three new services upsold to clients

## **Developing a Strategy in One Day**

KLR knew Social Tribe didn't have a lot of time, so they conducted a one-day off-site that would concentrate on three main priorities that were identified during the initial conversations and one-on-one interviews. Conley and KLR established that the off-site would focus on three main areas: identifying new growth opportunities develop a profile of the ideal new hire and update the company's mission and values to reflect the last two years of evolution. Each of these three areas had two to three objectives that mapped back to accomplishing the main goals. "I was a little skeptical that we could realize all of this in one day," says Conley. "But, KLR had no problem accomplishing everything and more."

During the retreat, KLR conducted exercises that explored each priority from every angle and enabled the group to develop a full strategic plan in one day. "I'm a very driven person, who doesn't like to waste time," says Conley. "I have to say that there was not a minute squandered during the retreat. I really liked that KLR kept us on point and on task the entire day." Not only was the retreat able to accomplish their three main objectives, Conley and her employee left the off-site with a clearly defined direction with team and personal goals spelled out and calendared. KLR is able to achieve such rapid results during a retreat by leveraging proven best practices and methodologies that enable clients to move from identifying issues to developing solutions in a non-threatening environment.

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*~Megan Conley, Founder  
Social Tribe*

## **A Prosperous New Hire**

"The retreat enabled us to closely examine the skill set and personality needed for our group's evolution and by the end of the day, we had developed a profile of our next ideal employee," says Conley. "We were able to be very intentional during the hiring process and move quickly to find the right candidate. We even asked KLR to interview our final applicants to ensure we made the right choice." Social Tribe's business has realized immediate benefits from Conley's successful new hire. "Within six weeks of hiring, we were able to upsell three new services to our clients," says Conley. "I am so amazed when I think of the direct, bottom-line results we have seen because of that one day we spent with KLR. It's quite incredible."

## **Value for Startups**

"When you are a startup, it's all about execution and you have to be excellent at everything to make it work. Plus, you have to watch every dollar," says Conley. "There's a lot of value delivered with KLR, and I never felt the relationship became transactional." Conley has also found a leadership mentor in KLR's CEO, Kristi Royse, and continues to call her about running her business. "I've learned a lot about leadership from Kristi," explains Conley. "I better understand my role as owner and am able to communicate my expectations more clearly to the people around me. I am definitely back in the driver's seat thanks to Kristi Royse and KLR Consulting."

To find out more about how KLR Consulting can help you, visit our website at [www.klrconsulting.com](http://www.klrconsulting.com).