FOR CORPORATES

How a Business Advisory Engagement Works

From the first call to a measurable outcome.

Every Business Advisory engagement runs through the same four stages, whether the work is a growth strategy refresh, an operating model redesign, or a positioning reset. The sequence is fixed; what changes is what we find along the way — and the plan is built around what your organization can actually execute, not a generic framework.

This document walks through each stage in more detail than the website — what actually happens, and what we're looking for at each point.

The Four Stages

01 Discovery

02 Diagnosis

03 Roadmap

04 Execution

A Few Things to Expect

- No generic intake forms or off-the-shelf frameworks
- The same team from discovery through execution
- A plan scoped to what you can actually execute
- Direct access throughout — no account-manager layer

Stage 01 · Discovery

We start with a conversation, not a form. Expect direct questions about where growth has stalled, what's already been tried, and what a good outcome would actually look like — no generic intake questionnaire. This is also where we scope whether the work centers on growth strategy, operating model, market positioning, or technology strategy & selection, based on what's actually blocking progress.

No generic intake questionnaire	Scopes which practice area fits	A shared definition of a good outcome

Stage 02 · Diagnosis

Before recommending anything, we get underneath the problem as it's actually experienced day to day — talking to the people closest to the work, not just the leadership team, and looking at how decisions really get made versus how the org chart says they should. The goal is to find what's actually driving the issue, not just the symptom that's visible from the boardroom.

Talks to the people doing the work	Maps how decisions really get made	Finds the driver, not the symptom

Stage 03 · Roadmap

The output isn't a slide deck of generic frameworks and levers — it's a prioritized plan sequenced around what the organization can realistically execute given its current capacity and appetite for change, with the highest-leverage moves surfaced first and the rest sequenced behind them.

Prioritized, not a slide of frameworks	Sequenced to current capacity	Highest-leverage moves surfaced first

Stage 04 · Execution

We stay hands-on through rollout rather than handing off a plan and stepping back — working alongside your team as the changes go live, adjusting as real conditions surface, with the same rigor we brought to the diagnosis, until the outcome is measurable.

Hands-on through rollout	Adjusts as real conditions surface	Same rigor, to a measurable outcome

What This Looks Like in Practice

The four stages aren't rigid gates. Some engagements move through diagnosis and roadmap quickly when the problem is already well understood; others spend more time in discovery when the real issue isn't yet clear. What doesn't change is the team — the same people who scope the engagement stay on it through execution — and every stage is built around what your organization can actually act on, not a standard consulting template.

Where Each Stage Leaves You

After Discovery

A clear, shared view of where the business stands today and which of the four practice areas the engagement should focus on.

After Diagnosis

The real driver of the problem identified — not just the symptom that was visible going in.

After the Roadmap

A prioritized, sequenced plan built around what the organization can actually execute, not a generic framework.

After Execution

A measurable outcome, delivered alongside your team rather than handed off as a deck.

Ready to Talk?

Book a discovery call — no obligation, no generic pitch. We'll talk through where the business stands today and whether advisory is the right next step.

Book a Business Advisory Discovery Call →