



CASE STUDY

Creating a New Client Relationship: Assessing Needs, Establishing Priorities, Building Knowledge

An Organization in Flux

A large, complicated health care association with both for-profit and non-profit arms was going through major changes:

- A dramatic shift in market demographics and psychographics
- New leadership forging a new culture
- A call for centralization and efficiency
- A new demand for customer-centric, fact-based decision making

Need for a Research Partner

The leadership wanted to establish a relationship with one primary research vendor to:

- Assess organization-wide research needs, recommend priorities, and propose a plan and budget for the next two years
- Use research to guide strategic and tactical decisions
- Help the organization establish a centralized research function, and
- Collaborate on an on-going basis with staff, volunteer leadership and consultants

Learning the Business, Building Trust

Other firms recommended costly approaches that would take at least six months to complete. Edge offered an “Immersion Process” that was thorough, expeditious and affordable. Led by two Edge Principals, in three months we:

- Reviewed over 30 pounds of background information
- Conducted 36 hours of listening sessions among 12 departments and committees
- Held an initial branding summit with organizational leadership
- Prepared an in-depth report analyzing both big picture themes and specific needs by department
- Recommended a detailed two year research plan and budget
- Held an in-person debrief on our findings and recommendations
- Forged a consensus on what needed to be accomplished and when

A Foundation for Success

The wealth of data we have collected and analyzed in the last nine months has become the backbone of the organization’s new three-year Strategic Plan. The leadership has called our work “dramatic,” “unprecedented,” and the “launching point for major organizational decisions moving forward.”

Put Edge to work for you!