

# Platinum Resource Group Illuminates Strategic Path

While Kathryn looked forward to taking the helm with a new executive leadership team, she realized there were existing and growing challenges. Past management had failed to invest in technology and maintain compliance with banking industry regulations. Unfortunately, this impacted the brand, customer perception and sales.



"It's the lack of strategic direction, opportunities and risks you don't see that hurt the organization the most in the long term."

KATHRYN  
CEO  
LARGE-SIZE FINANCIAL SERVICES COMPANY

## Strategic Clarity Needed

"In addition to the pressure to become compliant with changing industry regulations, our organization's technology offering had fallen behind industry standards, so we were less attractive to customers compared to our competitors who embraced new technology and services," explains Kathryn.

## Reaching out to Platinum Resource Group

Kathryn turned to Platinum Resource Group with her most pressing challenges and needs.

"We discovered that Kathryn had some ideas about investing and implementing new technology, communications and positions, but she wasn't really sure what they were, how to form a plan, and put it into action" explains Christi Haley-Stover, CEO and Founder, Platinum Resource Group.

"Early on it was clear to Platinum Resource Group that Kathryn's company needed a solid strategic plan to execute against."

Christi Haley-Stover  
CEO and Founder  
Platinum Resource Group

### Customer Details:

Industry: Financial Services

Company Size: Large Enterprise

Location: Los Angeles, CA

Fortunately, Platinum Resource Group had previously placed a Senior Strategic Consultant with another financial services organization that overcame similar challenges to develop a strategic technology and compliance road map.

"Platinum Resource Group implements a thorough two-tier candidate vetting process prior to submitting the candidate to the client. This ensures the candidate's skill level competence, expertise and soft skill compatibility with the client. Platinum Resource Group transcends the typical business relationship by creating a personalized approach to addressing her needs -- it's how we understand and collaborate with all our clients," says Haley-Stover. "We had the perfect consultant with the experience, talent and expertise to facilitate the sharing of best practices."

## Building the Vision

Platinum Resource Group arranged for Kathryn and her team to meet with an industry executive who had faced similar challenges and was willing to share the top-level vision and best practices. With this added perspective, the Platinum Resource Group Senior Strategic Consultant led Kathryn and her team with transforming everyone's input into a holistic view of the challenges and vision of where to take the company. With those insights and best practices, the Platinum Resource Group consultant and Kathryn's team were able to define and develop a strategic technology and compliance plan and roadmap.

"Our Senior Strategic Consultant was able to transform the vision Kathryn had in her head with the insights from the best practices sharing session into an actionable strategic road map," says Haley-Stover. "Finally, they had the ability to chart a path to what they need to do, how to go forward, and how to take their organizations to the next level."

## Strategic Visibility for Today and Tomorrow

Now Kathryn's financial services organization has new direction and innovative insights about future strategies thanks to Platinum Resource Group's placement of a highly-qualified Senior Strategy Consultant. Previously, the financial organization lacked a road map, failed to invest in vital technology and faced compliance challenges. However, under the leadership of the Platinum Resource Group's Senior Strategic Consultant, Kathryn's organization has already begun to invest in technology targeting their customers.

"Since having the Senior Strategy Consultant onboard, we have the visibility and direction for technology investments and how to stay in compliance with changing banking industry regulations," says Kathryn. "The Platinum Resource Group Senior Strategy Consultant has become an integral part of our executive team. Today, we can proactively and strategically prepare for the future thanks to partnering with Platinum Resource Group."

## About Platinum Resource Group

Platinum Resource Group is a professional level consulting firm, providing resources to Fortune 1000 client companies in the areas of technology, human resources, accounting, finance, business systems and supply chain, on a contract and interim basis. Platinum Resource Group has operations in Orange County, San Diego, Los Angeles and San Francisco

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