



Aligning Corporate Direction

Corporate Health and Governance Evaluation

Every business owner has goals and aspirations in mind for their business. The Blue Trust business consulting team is ready to help business leaders steward those ambitions by evaluating the company's fiscal health and corporate governance position.

Our business consulting advisors employ a collaborative approach, rather than a predetermined list of solutions, to ensure that each company receives the unique evaluation it merits. We apply principled wisdom as we evaluate the following eight essential aspects of business health:

1. Governance Structure

We work with corporate leaders to provide insight about the optimal corporate governance for the enterprise. The options often range from an advisory board to a formal, policy-setting board with independent directors.

2. Financial Prosperity

We will evaluate the company's historical and current revenue, expenses, profitability, and capital structure. We will assess the risks associated with its market position and corporate leverage.

3. Strategic Vision/Growth

Corporate leaders will describe their vision and growth initiatives, rationale for remaining relevant, and innovation strategies. Our advisors will collaborate with leaders to ensure clarity into corporate direction and vision.

4. Financial Controls/Reporting

With team executives, we will assess the quality of information being processed and communicated and whether adequate financial oversight exists.

5. Enterprise Value

Our team will evaluate the corporate enterprise value and address possible ways to maximize future value through market intelligence, strategic positioning, and crisis avoidance.

6. Leadership

We will work with team leaders to determine how employees are being recruited and trained for future leadership positions and whether the employees have a clear understanding of their opportunities.

7. Succession and Continuity Readiness

We will work with corporate leaders to determine who is next in line for leadership, whether there is an intentional plan in place for formal transition, and whether the company is prepared for a catastrophic leader event.

8. Corporate Culture

With team leaders, we will help determine how the company is following its mission, vision, and core corporate values. We will consider how employees embody the corporate culture and ways to avoid mission drift.