

## CASE STUDY: Setting Up For Success

KEA Advisors began working with TransEdge Truck Centers in October 2017. The scope of the engagement is strategic in nature, combined with succession planning for the executive level of the organization, and ongoing leadership training for Kirsten Dwyer, an ATD graduate and eventual successor to the dealer principal Bob Dwyer.

During the course of the engagement, we developed a formalized budgeting process that put some framework around the strategic planning process. To support this, new role descriptions backed up by KRAs (Key Result Areas) and KPIs (Key Performance Indicators) were developed for the key members of the executive team. With that, we created a vision, "The Clear Path," for the team to follow that meets the goals and objectives of the company and owners.

We also partnered on a move away from outdated technology to the install of a new DMS which enhances data reporting capabilities and ease of producing financial information. Additionally, since the start of the engagement, key personnel were hired, including a new Parts Director, Service Director, and Staff Accountant, as part of the strategy to build a team for the future.

Kirsten Dwyer of TransEdge shared, "There is no doubt that KEA Advisors has had a positive impact on our business. Our project lead, Bob Ichniowski and his team raise the bar. We also were able to partner on a DMS Profit Clinic, a vital part of an effective system install.

This engagement proved to be instrumental in our company's growth and success over the past year.

Thank you to everyone at KEA Advisors for your ongoing support!"

Ongoing leadership training was a key factor to the successes that TransEdge has realized while at the same time building a strong team for the future. Their investment in people and processes supported by KEA Advisors' best practices has taken them to the next level for many years to come.

