



Australia's Small to Medium Business Advisors.



Real World Client Case Studies

Important Disclaimer: Due to client confidentiality and business IP, the information contained in this document has been stripped back. What we outline is a small glimpse into a real client project. Please contact us for a confidential chat for more in-depth discussions pertaining to any of the services we offer or that are outlined in this document.

Case Study: Value Building

Industry: Retail

Scope: Strategy and planning, operational redesign, digital transformation, marketing.

OVERVIEW

E-commerce has become the lifeline for many bricks-and-mortar businesses seeking to stay competitive and lead their markets. This case study details how we partnered with a hybrid bricks-and-clicks retailer to transform it into one of Australia's strongest digital players in their field — while also freeing its management team from late nights and weekend work. Over several engagements spanning multiple years, we helped elevate performance, profitability, and overall business value.

Industry: Niche Retail – specifics withheld for confidentiality reasons.

Business Model: B2B and B2C – supplying products, including custom branded.

Established Business: 10+ years.

Reach: National.

E-Commerce Capability Pre-engagement: Quasi-E-Commerce – that is, a website that had listed products for sale, however, prices were not displayed, no payments were taken via the website and other such issues.

Business Size: Revenue of ~\$3 million per annum *at the start of the engagement*; 5 staff. *Post the last engagement*, revenue ~ \$10 million, most importantly significant increase in net profit % and headcount only growing to 7 staff.

ENGAGEMENTS

Engagement #1 – Develop a strategic business plan that leverages customer insights and competitor analysis as core inputs.

Growth had plateaued. Poor stock control, fulfilment bottlenecks and other process gaps were eating into margins and sapping management's time.

Engagement Outcomes

We were asked to break the stalemate. After gathering fresh customer insights and running a full competitor analysis, we built a roadmap to reignite momentum and remove the operational pain points.

- **Diagnostic deep-dive** – delivered a clear picture of the business's current position, opportunities and risks.
- **Market research** – mapped customer needs and emerging demand trends.
- **Competitor analysis** – uncovered strategic gaps the business could exploit.
- **Three-year growth strategy** – co-authored with the owners, prioritising high-impact initiatives.

- **Tactical implementation plan** – specified what had to be done, by whom and by when, complete with milestones and success metrics.

Engagement #2 – Digital Transformation & Operational Redesign

Duration: ~12 months

We led a full-scale digital transformation to modernise operations and eliminate growth-limiting bottlenecks.

What We Did

- **Business-process review & re-engineering** – mapped every workflow, then redesigned each for speed, accuracy and scalability.
- **Interim operations redesign** – implemented stop-gap procedures while new technology was being built.
- **Requirements scoping** – documented detailed website and system specifications.
- **Agency selection & oversight** – shortlisted vendors, negotiated contracts and managed delivery.
- **Project management, training & change management** – kept the program on time and budget while upskilling staff.

Project Outcomes

1. **Multi-layer digital strategy** implemented across sales, fulfilment and customer service.
2. **Process automation** removed manual data entry and double handling, boosting capacity and slashing errors.
3. **Seamless integration** of customer, admin, warehouse and logistics workflows cut fulfilment errors to near zero.
4. **End-to-end data visibility** enabled real-time tracking of all key metrics.

Business Impact

- Revenue **+75 %** | Net profit **+50 %**
- Web conversion rate up sharply; marketing ROI improved through richer data capture.
- Headcount rose by just 0.5 FTE despite growth. Management no longer works evenings or weekends.
- The business became efficient, profitable and scalable.

Engagement #3 – Growth Implementation & Mentoring

Duration: 12 months

Following the transformation, we mentored the team to execute the sales-and-marketing pillars of the growth strategy while also elevating their overall business acumen.

Key Activities

- Introduced structured monthly management meetings.
- Delivered training in business management, digital marketing and sales leadership.

Results

- **Revenue ×3 | Profit ×5** within three years (across Engagements 1-3).
- **Valuation ≈6×** original level.
- Management gained the skills to run the new digital business independently.

Engagement #4 – Digital Evolution

Duration: ~9 months

Two years after the last engagement, we returned to guide the next digital upgrade — rescuing a stalled website redevelopment project and positioning the business for its next growth wave.

What We Did

- Ran stakeholder workshops to confirm current state, gaps and future requirements.
- Produced detailed requirements documentation.
- Engaged a more capable development agency and provided end-to-end project management, testing and user training.
- Aligned operational processes to maximise new platform capabilities.

Outcomes & Impact

- All project requirements met; the new platform can support tens of millions of dollars in sales.
- Enhanced operational visibility and further automation cut manual workloads even more.
- The business is now firmly established as a top-tier digital player in its sector.

Today, this company is recognised as an industry leader — far removed from the stagnation of our first meeting.

Case Study: Business Mentoring program

Industry: Various

Scope: Business mentoring

OVERVIEW

Several years ago, a regional council sought business-mentoring facilitators. We secured a place on the council's panel of approved advisors.

Industry: Industry agnostic, focusing on businesses within a particular council region.

Business Model: Mix of clients – B2B and B2C.

Program duration: Up to 4-months each year. This program has now run several times since council started it a few years back.

Business Size: Varied, from startups to well established businesses turning over several million \$'s.

ENGAGEMENTS

Approach

1. **Deep-dive diagnostic** – each engagement began with a comprehensive assessment of the business's current state, challenges and opportunities.
2. **Goal-setting workshop** – in partnership with the owners we set clear objectives and measurable deliverables for the mentoring period.
3. **Intensive mentoring & training** – we guided owners through the action plan, provided hands-on training and offered ongoing support throughout the program.

Results

- **100 % goal attainment:** every participating business achieved or exceeded its agreed targets.
- **Continuous demand:** the council has re-engaged us each year to deliver further mentoring cohorts.

Industries Served

- **Agriculture:** goat, cattle, feedlot and crop operations
- **Retail**
- **Tourism & accommodation**
- **Hospitality**
- **Digital technology**

Typical Advisory Focus

- Business strategy and planning
- Operational improvement
- Sales and marketing strategy

- Building and managing teams
- Owner effectiveness and leadership coaching
- Start-up support
- Exit-strategy design and implementation

Case Study: Value Building & Exit Planning

Industry: Manufacturing

Scope: Strategy and planning, operational and organisation redesign, digital transformation, exit planning

OVERVIEW

A thriving manufacturing company engaged us to ease its growth-related pain points, build enterprise value, and craft an exit strategy that would position the owner for a future sale.

Industry: Manufacturing

Business Model: B2B and B2C.

Established Business: 6+ years

Reach: One State only, part of a franchise group.

Business Size: ~\$4million per annum; 7 staff.

ENGAGEMENTS

Engagement #1 – Growth Strategy & Exit Planning

Challenge

Revenue had plateaued because the company:

1. Needed additional staff to handle further sales.
2. Operated with manual systems and patchy processes that throttled capacity.

Our Approach

- **Deep-dive diagnostic** – uncovered operational roadblocks and growth opportunities the owner had been reluctant to tackle.
- **Customer interviews & competitor mystery-shopping** – 15 customers interviewed, and key rivals benchmarked.
- **Five-year strategic plan** – aligned with the owner's goal to sell within ~5 years, defining priorities for controlled, sustainable growth.
- **Owner & management mentoring** – several months of hands-on coaching and selective execution support to embed the plan.

Engagement #2 – Workflow & Organisational Redesign

Root Causes Identified

1. **Inefficient workflows** – exact bottlenecks, redundant touch-points and paper-driven admin points clearly identified.
2. **People-role misalignment** – unclear responsibilities and weak production leadership.

Three-Step Solution

1. **Interim fixes** – quick wins to stabilise workflows.
2. **Robust systems & processes** – long-term technology and standard operating procedures (SOPs) roll-out.
3. **Organisation redesign** – right-person-right-seat structure.

Key Findings from Process & Workflow Study

- Assembly area layout forced excessive movement.
- Tool shortages created idle time.
- Inconsistent bench layouts slowed staff switching stations.
- Unclear leadership within the production team.

Outcomes (≈12 months)

- Manual, paper-heavy operation replaced by modern, streamlined processes and digital systems.
- Production team re-organised; a “rising star” promoted to a new production-manager role.
- Owner stepped out of day-to-day production, focusing on strategy and sale preparation.

Overall Business Impact

- Owner regained work-life balance and the strategic head-space of a true CEO.
- Business is now positioned for scalable growth and a well-structured exit: the promoted manager is set to transition from employee to owner as part of the exit plan.

Case Study: Strategy and Digital Transformation

Industry: Registered Training Organisation

Scope: Strategy and digital transformation

OVERVIEW

A previously offline registered training organisation engaged us to craft and implement its next-phase growth strategy. After we delivered the plan, we provided six months of mentoring to embed the changes. Less than a year later, COVID-19 struck, forcing the business to accelerate the strategy's digital component by several years. Because we were already in place, we guided the rapid pivot and helped the organisation avert near-certain collapse during the height of the lockdowns.

Industry: RTO within a specific niche

Business Model: B2B only, providing face to face training solutions.

Established Business: 10+ years.

Reach: One State only at the start of the engagement. Successful expansion into a second State following the engagement.

Business Size: Revenue of several million \$'s per annum; 8 staff.

ENGAGEMENTS

Engagement #1 – Growth Strategy & Exit Planning

Including customer-insights research, competitor analysis and owner mentoring

Context

Revenue and profit had declined for two consecutive years. Competitive pressure and the rapid rise of digital delivery threatened the RTO's face-to-face model.

Our Work

1. **Deep-dive diagnostic** – revealed the organisation's static operating model and outdated methods.
2. **Customer research** – 15 current and former clients interviewed using a standardised question set.
3. **Competitor analysis** – mystery-shopping and undercover benchmarking to gauge rivals' offerings.
4. **Five-year strategic plan** – co-designed with management to modernise operations, restore growth and position the business for a future sale.
5. **Implementation mentoring (6 months)** – hands-on guidance to embed the plan and keep execution on track.

Result

A clear, actionable roadmap that future-proofed the business and laid the groundwork for digital transformation.

Engagement #2 – Rapid Digital Transformation

Triggered by COVID-19, completed in 3 months

Crisis

Lockdowns halted face-to-face training, threatening closure. The CEO called on us to accelerate the digital component of the strategy by several years.

Actions

1. **Emergency pivot to online** – migrated all courses to a learning-management system within weeks.
2. **Hybrid delivery model** – designed processes to support future offline, online and blended training.

Outcomes

- **Revenue rebound:** diversified delivery channels generated new income streams.
- **Operational efficiency:** higher training volumes handled without extra headcount, lifting margins.
- **Market repositioning:** the RTO emerged as a credible digital competitor with flexible offerings.

Long-term impact

The accelerated transformation not only saved the business during the pandemic but also set it up for sustained growth and a stronger competitive position in a digital-first market.

Case Study: Sale Ready Preparation

Industry: Accommodation

Scope: Sale Ready Preparation

OVERVIEW

The owners of a rural motel were assigned to us through a regional mentoring program. From the outset, they asked for our help preparing the business for sale.

Industry: Accommodation - Motel

Business Model: B2C

Established Business: 15+ years

Reach: One motel, rural location.

Business Size: Revenue under \$1million pa.

ENGAGEMENT – Sale-Ready Preparation for a Rural Motel

Objective

Prepare the business for listing with a broker and maximise its market appeal.

Approach

1. **Deep-dive diagnostic** – quickly identified the key gaps that could hinder a successful sale.
2. **Action plan** – converted those gaps into a clear task list, prioritised and timeline-driven.
3. **Hands-on support** – worked side-by-side with the owners over several months to deliver each item.

Key Improvements Delivered

- **Financial housekeeping** – updated and clarified all records.
- **Strategic documentation** – wrote a concise business plan for prospective buyers.
- **Asset upgrades**
 - Installed new air-conditioners and repainted every room.
 - Added solar panels via a local grant scheme.
 - Refreshed motel signage and fence to enhance street appeal.
- **Marketing uplift** – launched a basic but targeted campaign to lift visibility and occupancy.

Impact

- **Stronger first impressions** – cosmetic and sustainability upgrades boosted curb appeal.
- **Higher occupancy & revenue** – improved cash flow allowed the owners to hold the asset longer and capture additional profit.
- **Successful exit** – motel sold at the target price, validating the sale-readiness work.



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