



Optimiza conducts a Corporate Strategy Assessment & Formulation for a Leading Investment company in Jordan

During the summer of 2008 and after having realized the need for major transformation, a leading investment company in Jordan had acknowledged the need for deploying a new strategic approach and business model. The company management wanted to review its strategic direction and transform it into a leading regional investment company, in addition to applying best practices in the field of investment management, operating model, and governance. Furthermore, the company strived for identifying, attracting, and recruiting best talent to form the core management team that would lead the company in achieving the company's vision.

This is when Optimiza carried out a Strategic Planning and Business Transformation project that included:

- Conducting strategy assessment
- Conducting company –wide capability assessment
- Setting internal audit policies and procedures
- Setting STU governance and templates
- Formulating a Transformation strategy
- Building the company's Operating Model (Company core and supporting functions, internal and external communications, functional descriptions, Organization design and Job profiles)
- Pilot STU through implementing project initiatives
- Building the company's Investment Committee bylaws
- Building a financial projections model for the company and all its subsidiaries and affiliates