



Business Optimization



Business Optimization is what we do *and* the outcome we deliver.

No matter their size or mission, organizations are more effective and efficient when their strategies and goals – and the processes they rely on to achieve them – are well calibrated and well communicated.

Business Optimization, therefore, is both a Wheelhouse Group offering and an outcome. It's a suite of services blended together, tailored for an organization's unique needs and designed to deliver results. It's the way we help executives and their organizations define success, build the roadmap to get there and meet the milestones along the way.

Is your organization optimized for success?

- Are your investments aligned with your strategic vision?
- Do you have a clear, achievable portfolio of strategic initiatives?
- Are your projects managed with consistency, accountability and clear metrics?
- And what could you accomplish if they were?

Imagine a partner who works shoulder to shoulder with you to help your organization define a compelling strategy and an aligned investment portfolio – with experts in governance and program management practices. We support your team to manage schedules, identify risks, drive deadlines and engage project stakeholders. Wheelhouse Group designs and facilitates the leadership meetings and project reporting structures that are characteristic of well-run companies. We help you implement program management approaches that ensure collaboration and accountability – and become part of the way you do business.



What We Believe

Too often, Business Optimization is viewed as a rote process of metrics reporting and executive sign-off. Our methodology is effective because it encourages teams to surface issues and risks in a supported environment, engages people in collaborative discussion to resolve issues and ensures accountability through the tracking of actions and a structured, consistent meeting cadence.

- ▶ Well-run organizations have a visionary strategy, shared goals and a set of clear priorities.
- ▶ They put in place effective governance and performance measurement tools that drive collaboration and accountability – practices that become embedded in every aspect of their operations.
- ▶ They choose partners that expertly navigate strategic and tactical activities, partners that develop a strategy and then roll up their sleeves to make it happen. *(This is work we love to do.)*

How We Work

Wheelhouse Group clients say working with us is easy. We serve as an extension of your team, helping you manage and deliver on internal strategic priorities. We work efficiently and effectively, demonstrating a clear purpose and value. We work creatively to align people, actions, and results, driving both buy-in and adoption and building on decades of experience in successful business optimization initiatives. ***We move organizations from reluctance to results™.***

Who We Are

We're seasoned, senior-level consultants who are both strategists and doers. We help organizations and their people navigate, thrive and excel at change.

What We Do: Organizational Change Management, Stakeholder Engagement & Communications, Workforce Transformation, and Business Optimization

Where We Focus: Technology Adoption, DevOps Culture Building, Delivering CX, Cloud Adoption, Cybersecurity Mindset, and Artificial Intelligence Integration

Our Impact



The **Filing Season Integration Services (FSIS) Office** within the **Internal Revenue Service (IRS)** IT organization depends on Wheelhouse Group to ensure it can effectively deliver the nation's tax filing season and deliver on the mandates for each year's tax regulations. Our team developed crucial, performance-oriented resources, such as the first ever Integrated Master Schedule for the filing season, the office's Standard Operating Procedures, the Filing Season Readiness Lifecycle, and the Filing Season Playbook.



Wheelhouse Group helped the **U.S. Mint's IT Directorate (ITD)** deliver a strategic roadmap outlining the goals, activities and behaviors necessary for successful delivery of IT services. We conducted a detailed analysis of the ITD project portfolio, prioritizing over 90 projects and operations initiatives, mapping them against the U.S. Mint's strategies and ITD's priorities. Our team developed and implemented a project management framework to help teams effectively plan and execute on their projects.

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Founded in 2003, Wheelhouse Group is an SBA-certified woman-owned small business (WOSB).

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