



"Success is defined by the achievements of our clients. We are honored to collaborate with leaders who are committed to envisioning a brighter future and making it a reality."

Jason M. Bordui  
President & Founder



The mission of Balanced Growth is to create enduring value for organizations that are driven by both purpose and profit. To fulfill this mission, BG specializes in strategy, operations and innovation in the Insurance, Financial Services and Healthcare sectors. We pride ourselves on collaboration with client leaders and teams. Together, we design, implement and accelerate high-impact strategic, operational, technology and innovation initiatives.

**Strategic Planning** develops cohesive strategies supported by practical plans to achieve far-reaching goals.

**Operations & Technology** services holistically improve processes that are informed by data, enabled by technology, and supported by high-performing teams.

**Innovation** discovers fresh ways to create value and meet customer needs during today's digital renaissance.

The BG team delivers results through the full life cycle from vision through strategy, tactics and execution.

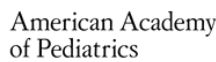
**Strategy** - Create a multi-year view to map out the future with goals, initiatives and prioritized plans.

**Design** - Design process, technology and organizational solutions to operationalize the strategy.

**Implementation** - "Roll up our sleeves" to accelerate high-impact initiatives while reducing risk to meet strategic goals.

**Advisory** - Deliver continuous guidance and support to promote long-term success.

## REPRESENTATIVE CLIENTS



## STRATEGY



### Strategic Planning

Develop cohesive strategies supported by practical plans to achieve far-reaching goals. This winning approach navigates priorities and creates alignment to position your organization for the future.



### Operations & Technology Strategy

Holistically improve processes informed by data, enabled by technology and supported by high-performing teams to enhance the customer experience and increase productivity.



### Innovation Strategy

Discover fresh ways to create value and meet customer needs through cultivating an innovative mindset, envisioning new solutions and commercializing adjacent business opportunities.

## SOLUTION DESIGN



### Business Process Design

Design and optimize core business processes to enhance efficiency, speed and ease of use for customers.



### Technology Solution Design

Apply data and technological solutions to achieve business objectives and enhance the customer experience.



### Organization Design

Design structure and align roles and resources to improve performance, increase agility, and meet customer needs.

## IMPLEMENTATION LEADERSHIP

Winning the future requires a cohesive strategy and relentless execution.



### Strategic Program Management

Lead and coordinate multiple, related projects to ensure they align with the strategic goals and are executed effectively while managing risk.



### Project Management

Plan, align and manage tasks, resources, and timelines to successfully complete a project within scope, time, and budget parameters.



### Business Requirements Definition

Identify and document specific business requirements to ensure a clear understanding among stakeholders and drive the systems development lifecycle.



### Vendor Selection

Leverage a proven methodology to select the most suitable service providers based on your requirements, budget, and other critical factors.



### Testing Center of Excellence

Establish a centralized hub within your organization to standardize and optimize testing processes, tools, and expertise.

## ADVISORY & ONGOING SERVICES



### Advisory Services

Provide expert advice and guidance to help make informed decisions and improve overall performance.



### Board and Executive Facilitation

Collaborate with your organization's leadership on strategy, governance, operations, technology, and overall performance.



### Operational Support

Maintain and optimize an organization's day-to-day operations, ensuring efficiency, stability, and continuous improvement.