



## ☩ TWO-DAY DIAGNOSTIC: A QUICK AND NIMBLE APPROACH TO A CLEAR PATH FORWARD

When an organization comes to us with a business challenge, management often has trouble identifying a root cause, let alone articulating potential solutions. Many times, clients reach out for a particular ask, only to determine that what they thought was necessary, is not what they need after all.

**Why expend time and resources when a more focused approach will produce a greater return?**

Through our flexible Two-Day Diagnostic, Withum's Advisory professionals aim to discover the source(s) of a company's unique problems, work collaboratively to define 'success' and begin to develop a roadmap for achieving overall strategic goals.

At Withum, we value and honor our relationships and are proud of our success in helping clients tackle their business challenges. Whether your organization is experiencing a change in leadership, an internal business challenge, or an external threat, it can be advantageous to involve an independent perspective.

While many traditional consultants attempt to match their existing offerings to client problems, we take a different approach to first identify and explore the root cause of various challenges and then work collaboratively to develop tailored solutions that effectively address your specific needs. Our approach drives results and a path forward to help reduce stress, produce outcomes and enable leadership to demonstrate measurable progress. It's a perfect first-step to getting answers, whether you're looking for specific help around a focused project, or need guidance defining a broader strategy.

"In two short days, the Withum team was able to help us uncover some critical themes that were driving inefficiency in our organization and holding us back from continued growth. There was more to do after the diagnostic, but it was amazing how an independent perspective could help clear the path."

— Andrew McMurray, Retail Leader, Zachys Americas Fine Wine



WE ARE AN INDEPENDENT MEMBER OF  
**THE GLOBAL ADVISORY  
AND ACCOUNTING NETWORK**



**Meghan Watson**  
Team leader  
Management Consulting Services  
T (609) 216 3423  
mwatson@withum.com



**Joe Riccio**  
Partner  
Management Consulting Services  
T (609) 514 5597  
jriccio@withum.com



# withum<sup>+</sup>



THE DETAILS



THE DELIVERABLES



GETTING A  
DIAGNOSTIC

A long-time tax client recently came to Withum requesting an audit. While we had the resources available to conduct financial statement audits, it was important that we further understood the motivation for the request. After two days with the client, we suggested they hold off on a traditional audit and conduct a series of strategy workshops and a focused technology assessment. Doing this enabled them to further define the organization's direction and address some immediate pain points causing financial disruption in their business model. The outcome of these activities drove immediate improvements to process, communication and resource utilization.

## THE DETAILS

The purpose of the Two-Day Diagnostic is to align organizational goals and objectives with the execution of day-to-day activities. The exercise attempts to boil down an organization to understand its past and current situation (what's worked and what hasn't), envision the future (what's on the horizon) and bridge the gaps.

A critical component of the diagnostic is a series of interviews with personnel in key functional roles. We create an opportunity for professionals at various levels to express their opinion, voice concerns and brainstorm ideas regarding potential improvements. Engaging professionals in the process not only generates potential solutions to existing challenges, but simultaneously generates 'buy-in' — a sense of ownership and accountability for action that isn't always easily achieved.

## THE DELIVERABLE

In only a few short days, leadership receives a deliverable that outlines key recommendations prioritized to help resolve specific challenges and/or look ahead to long-term business objectives.

The process and resulting deliverable leaves clients feeling confident in their path forward and less overwhelmed knowing they can begin resolving key pain points in a manageable yet impactful way — a small investment with significant return.

"[Withum] was able to ask important questions, articulate the issues as an independent observer, help guide necessary changes, keep us focused on our goals and challenge us to think creatively about potential solutions. [Withum's] ability to quickly understand many of our business challenges was comforting. They were clearly invested in us throughout the entire process and I am grateful for the support they were able to provide."

— Don DeDonatis III, CEO, USSSA

## GETTING A DIAGNOSTIC

Withum often offers capabilities to follow-up with next steps, whether that be facilitating strategic planning, completing an operational assessment, or engaging in digital workplace transformation.

However, understanding where to start can be a huge first step! If you have questions about whether a Two-Day Diagnostic can help your organization, contact Meg Watson at [mwatson@withum.com](mailto:mwatson@withum.com), (609) 216 3423 or Joe Riccio at [jriccio@withum.com](mailto:jriccio@withum.com), (609) 514 5597.