

CLIENT CASE STUDY

How one leadership team turned organizational agility into practical action

CLIENT

American Cleaning Institute

SECTOR

National trade association

ENGAGEMENT

Organizational consulting and leadership facilitation

THE TENSION

The goal was greater agility. The need was clearer priorities and stronger decisions.

A capable leadership team was navigating multiple strategic priorities, stakeholder demands, and emerging opportunities at once. Agility mattered — but as an idea it was still broad, and broad ideas do not settle daily decisions.

THE CONTEXT

Everything mattered. Not everything could be first.

A national association carrying several strategic initiatives alongside ongoing stakeholder commitments and new opportunities arriving throughout the year.

THE CHALLENGE

An aspiration without a shared practice

The team needed to define what agility meant in their context and build shared ways to prioritize, decide, and follow through, without adopting a one-size-fits-all methodology.

THE RISK

Too many initiatives competing equally

Without clearer criteria and more consistent tradeoff conversations, strategic and operational work would keep blurring together, and new opportunities could pull focus from existing commitments.

Understand the organization first. Then build something it can actually use.

Kerri partnered with the leadership team over time rather than delivering a one-time solution, learning how the organization worked before shaping the approach around it.

01

Understand

Learn the organization's culture, strategic priorities, constraints, and leadership dynamics before shaping the approach.

02

Clarify

Define what mattered most and establish shared criteria for evaluating priorities, initiatives, and new opportunities.

03

Apply

Use the team's real strategic initiatives and live leadership decisions as the working material, not hypothetical scenarios.

04

Sustain

Build planning and review practices the leadership team could keep using after the engagement ended.

FROM

- Agility as a broad, important ambition
- Many priorities competing for equal attention
- Decision and tradeoff practices that varied
- New opportunities risking dilution of focus

TOWARD

- Shared criteria for evaluating initiatives
- Clearer strategic priorities
- More consistent leadership conversations
- A disciplined response to new opportunities

From an abstract aspiration to practical leadership habits.

A clearer process for evaluating initiatives and opportunities

Stronger alignment around strategic priorities

Fewer initiatives treated as equally urgent

More consistent discussions about tradeoffs and capacity

Greater ability to respond to opportunities while staying focused

Ways of working designed to continue beyond the engagement

“Kerri has a unique ability to quickly understand an organization's culture, priorities, and challenges, then tailor an approach that fits rather than applying a one-size-fits-all framework. She brought clarity to complex discussions, facilitated meaningful conversations across our team, and helped us establish ways of working that enabled us to evaluate strategic initiatives and opportunities more quickly and effectively.”

MELISSA HOCKSTAD

Former President & CEO, American Cleaning Institute

THIS WORK MAY BE RELEVANT WHEN

Growth has outpaced alignment, strategic priorities are competing, or leadership teams keep revisiting the same decisions without creating enough forward movement.

Let's talk about where greater clarity and alignment would create the most movement.

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