

# Atherton Consulting Group

## Strategy and Leadership Development for Investment Firms and Entrepreneurial Ventures

### Services

#### Strategy

- Off-site strategy facilitation
- Develop and clarify strategic vision
- Create sustainable competitive advantage statement
- Determine key metrics of success
- Effective accountability structure
- Marketing/distribution strategy
- Branding
- Funding strategy for entrepreneurial ventures

#### Leadership Development and Executive Coaching

- Developing the right mindset
- Communicate strategically
- Speaking as a leader (with video feedback)
- Building confidence and mastering influence techniques
- Effective and efficient decision-making
- Personality typing and 360 qualitative assessments
- Running effective Board meetings
- Maximizing your Board's potential
- Best leadership practices for CEOs and leadership team
- HR for start-ups (with strategic partner)

#### Engagement Result Examples:

- **Global private equity firm** – key challenges for \$2 billion asset firm were unclear business strategy and geographically dispersed and disconnected leadership team. Interviewed key leaders globally determining organizational strengths and impediments. Designed off-site strategy session resulting in strategic vision clarity, definition of five key strategic initiatives, delineation of resource needs and accountability structure and communication strategy for successful implementation. Follow up included coaching a key leader on decision rights and effective decision-making. Global leaders left with a clear vision of “rowing in the same direction” and developing a team atmosphere.
- **Venture-backed medical device company** – key challenges for Series B funded firm were ineffective Board meetings, unclear business and funding strategy and low trust between Chair and CEO resulting in micro-management and dissension in Board. Worked with CEO to significantly increase Board time on strategic issues, advice-seeking, improving relationships and Board engagement. Flow of ideas increased, energy improved significantly and team optimism resurfaced. Worked with CEO to develop and implement Board recruitment strategy considering industry knowledge, functional expertise, personality type and impact on group chemistry. Helped CEO focus and develop a decision framework for business strategy and funding alternatives. Result has been to minimize time loss, increase team engagement and CEO confidence and energy.
- **Hedge Fund of Funds** – Partner owned group managing \$10 billion wants to plan successfully for a new generation of leaders. Worked with one key high potential partner to expedite his leadership development for maximum firm impact. Key results included 1) improved presence and presentation using video feedback resulting in increased credibility, 2) transparent decision-making and communication resulting in increased trust and decision buy-in and 3) leading firm strategic planning coordination efforts resulting in timely completion of process, buy-in across entire firm and increased leadership influence.



**Jim Keene, CFA**

Jim Keene is the Founder of Atherton Consulting Group, LLC. He is a successful experienced investment management leader and coach. He helps investment firms and entrepreneurial ventures determine their strategic vision and competitive advantage, execute on strategic issues and growth strategies and provide leadership development and executive coaching for high performance. Jim's performance coaching model is based on six years of triathlon coaching he received from an Olympic coach and employs a combination of mastery practices, mindset development and proven influencing techniques. He has over twenty-five years experience in wealth management, venture leasing and commercial real estate. He has taught Alternative Investments at the University of San Francisco. He holds a B.S. in Business from Syracuse University graduating magna cum laude and an M.S. in Management from the Stanford University Graduate School of Business. He also holds the Chartered Financial Analyst designation. Jim has been President of CFA San Francisco, The Wellness Community – SF-East Bay and his class at Stanford. He has served on several advisory groups at the CFA Institute. He is a published author and writes topical research white papers and blog-posts on strategy and leadership topics.