



Wauton Samuel   
*Expert IT Solutions*

# Case Study: Automating A Business So It Works Without The CEO

**ActionCOACH**  
business coaching

 LONDON  
BUSINESS  
COACHING



## At a Glance

Through a series of radical improvements to Wauton Samuel's management, training and KPI (Key Performance Indicator) systems we were able to completely automate David's business. Initially stressed and overworked he now works there only 5 hours per week whilst the business is able to thrive and grow without him.

“The introduction of a business coaching programme has become a catalyst for a business transformation agenda, more effective management, changed working practices and a stronger focus on achievement of business goals.”

**Investors in People  
Report 2012**





# The Challenge

David Waugh owns two highly profitable businesses: education software provider Wauton Samuel and fitness centre Energie Forest Hill. With his extensive business interests consuming increasing amounts of time David asked me to help him realise his long-term ambition of completely automating one of his businesses.

- **Wauton Samuel generating +£1M revenue with solid year-on-year growth but operations overly reliant on David's constant presence**
- David still heavily involved in day to day business operations
- No time for David to concentrate on high value tasks: strategic planning and developing new products
- Customer service department underperforming and taking up much of David's time and energy
- David feeling stressed and unable to reach his ultimate goal of removing himself from the business

# The Solution

After taking the time to fully understand David's challenges we worked together to put in place a series of radical improvements to management structure, performance tracking, training programmes and team communication.

## Performance

- A new rewards and recognition system linked individual bonuses to financial and operational KPIs
- Innovative quality review systems track and monitor client calls and survey responses
- Awarded senior staff members company shares to foster a sense of ownership

## Communication

- Articulated a clear company vision & goals through a process of team meetings, one-to-one meetings and team alignment days
- Encouraged all team members to contribute to company vision and strategy via two way feedback
- Formal tracking of business, team and individual KPIs to increase accountability at all levels

## Training

- Performed skills audit and set up an in-house training programme run by experienced team members
- Management and staffing restructured: Created 3 new senior positions and filled via internal promotions
- Significant training for the senior management team on prioritizing, delegating, recognition and motivation to ensure high performance amongst the team

# The Results

After 12 months of hard work we achieved our goal of completely systemising and automating David's business. Not only did Wauton Samuel flourish as a result but David's newfound freedom allowed him to move on to bigger and better projects.

## Financial

- Net profit up 13%
- 88% of customers retained for 7 years
- 95% referral rate from existing customers
- Turnover up by 25% at David's other business Energie Forest Hill

## Personal

- David now works less than 5 hours per week at Wauton Samuel
- Now able to focus on 2 other businesses
- Net profit forecasted to significantly increase to £1M next year due to David securing a lucrative new software contract

"You probably don't realise how much of a testament it is to yourself that I feel able to trust you completely to guide my businesses and work with my employees. I have never allowed anyone to exert such an influence since I started trading. I very much appreciate the efforts you make on my behalf."

**David Waugh,  
Managing Director**

