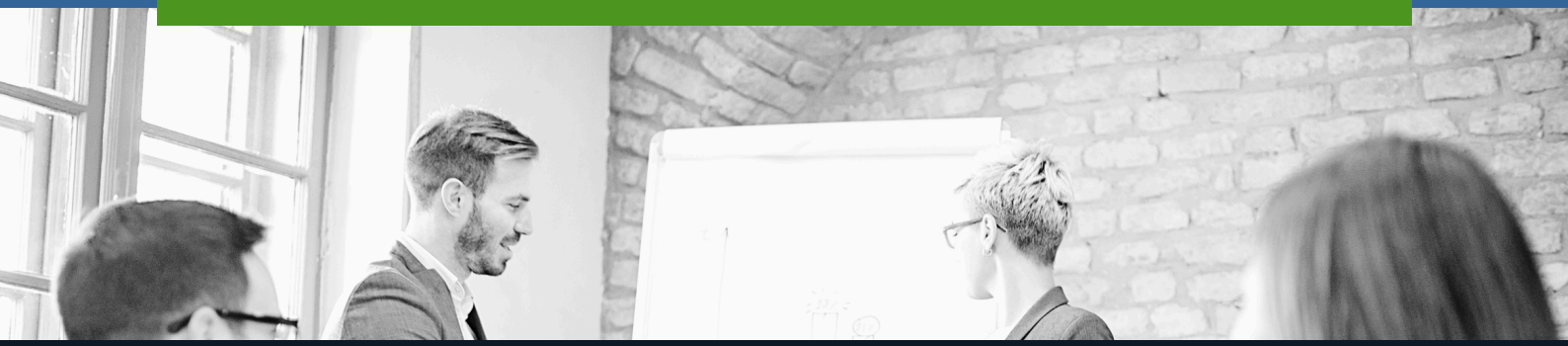
CASE STUDY



FRACTIONAL COO

SARAH M: CEO OF A FINANCIAL ADVISORY GROUP

Client Testimonial: *"Having a fractional COO was a game-changer. I got executive-level operational expertise without the $200K+ salary commitment. I'm back to doing what I do best—serving clients and growing the business."*

CLIENT COMPANY OVERVIEW

- Professional services firm with 15 employees
- Annual revenue: $2.3M
- Challenge: Rapid growth causing operational chaos

THE SOLUTION

Apex Virtual Solutions provided fractional COO services (20 hours/week) to:

- Implement project management systems (Asana) and standardized workflows
- Create departmental KPIs and accountability structures
- Develop client onboarding process reducing steps from 47 to 12
- Establish weekly leadership team meetings with clear agenda frameworks
- Build hiring and training protocols for scaling

THE CHALLENGE

Sarah's financial advisory firm grew 60% in 18 months, but operations couldn't keep pace. Client onboarding took 3-4 weeks, team members were unclear on priorities, and Sarah spent 70% of her time on internal issues rather than client relationships and business development.

RESULTS (12 MONTHS)

- Client onboarding reduced from 21 days to 5 days (76% improvement)
- Sarah's time on operations reduced from 70% to 25%
- Employee satisfaction increased from 6.2 to 8.7 (out of 10)
- Revenue increased 35% with same team size due to efficiency gains
- **ROI: For every $1 spent on fractional COO services, the firm saved $4.20 in operational costs**