

# Realize Results

Partnership, Strategy, Results

## CASE STUDY – REALIZE RESULTS, Inc. and MORGAN & DiSALVO, P.C.

**Client** Morgan & DiSalvo, P.C. (Alpharetta, Georgia) [www.morgandisalvo.com](http://www.morgandisalvo.com)  
**Industry** Law  
**Partners** Richard M. Morgan, Esq., Loraine M. DiSalvo, Esq.

Morgan & DiSalvo, P.C. (M&D) employs a consultative approach that begins by helping clients identify their goals. They help them plan for the changes that life brings in the areas of estate, business and tax planning. Just as they assist their clients in maximizing wealth and minimizing risk, they sought the expertise of Realize Results, Inc. (RRI) to assist with their own long-term strategic planning for long-term success.

### **Realize Results (RRI) Services: Strategy Development and Business Planning**

*"We were transitioning as a firm, moving offices and growing. RRI brought its extensive experience to bear. They helped us view our law practice as a business...they had our future in mind."*

### **Business Challenge**

M&D was not seeing the growth in revenue necessary to maintain and grow their firm. The estate planning and tax law environment was – and is – in a constant state of flux. In addition, the firm was moving locations, hiring new staff and adding a partner. Throughout all of this change, they had done little to develop a brand, market their firm or differentiate themselves in a strategic manner aside from traditional networking activities.

*"RRI saw the 'big picture' and understood our concerns. They helped us prioritize the dozens of steps necessary to achieve our goals...the most important one being continued excellent levels of service to all of our clients."*

### **Solution**

RRI completed a comprehensive strategic assessment of the practice - a thorough approach that included long-range planning, marketing (branding, target markets, messaging communications and business development initiatives), finance (pricing, compensation), business infrastructure (internal processes, workflow) and results management. RRI worked with its team of professionals and the firm's partners over the course of 12 months to build the strategy and business infrastructure critical to long-term success.

*"The RRI team had the expertise and "fit" to work comfortably with all of us. They guided us through strategic thought process and practical implementation of initiatives throughout the firm. RRI helped us determine what was important, how to measure it and how to ensure that it continues well into the future."*

### **Seeing Results**

The partners had a clear objective, were willing to make an investment and had the patience to spend the time necessary to ensure real change. Revenue increased 50% in one year. Their foundation is set to keep growing at this rate or more.

*"We now have a solid strategic base and business infrastructure...we expect to continue to grow at this pace."*

**Realize Results, Inc.**  
**Phone 678-795-1750**  
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