



The Spiral Hub

Clarify

A roadmap for navigating the sustainability transition – enabling business leaders to get clear on priorities and implement change

Delivered by Nicky Leach and Hannah Keartland

Nicky and Hannah both combine Big 4 experience with operating at Director and Board levels within organisations. They understand the practical realities of leadership and delivering change within established businesses. They are consistently praised for their practical, action-oriented approach to sustainability and change.

By working together, they combine their different skills and experience to help business leaders navigate the sustainability transition.



Hannah brings the 'what'

Hannah is the founder of the B Corp™ certified consultancy Keartland & Co. She has spent her career working in and with impact-led organisations and understands how to put positive impact at the core of a business. She has the unusual blend of having led both Innovation and Finance & Operations functions. She is a Fellow of the Institute of Chartered Accountants in England & Wales and sits on their Sustainability Committee. She is also a TEDx speaker.



Nicky brings the 'how'

Nicky combines consultancy, coaching and training to empower business leaders with the skills and confidence to successfully drive and implement change within their business. She is on a mission to change the way businesses approach change.

As a Director in the NHS, her results-orientated approach to change led to improved patient experience, reduced waiting times, increased staff satisfaction and services delivered under budget.

“ You make it easy. I like your energy, how you both interact and compliment each other. Your expertise – you’re clearly both subject matter experts and I like the different balance that each brings.

You add value – simple as that ”

We work with business leaders who are passionate about having a meaningful impact on the world through their business.

They've already started on the journey to being a sustainable business and want to go further in amplifying and scaling up their impact.

They share a common set of challenges:

1

Want to do this but **don't know what steps to take or what to prioritise**

2

They struggle **to collaborate effectively** across the business to deliver change

3

They are unsure about the **costs involved** or the **support** they might need



CLARIFY

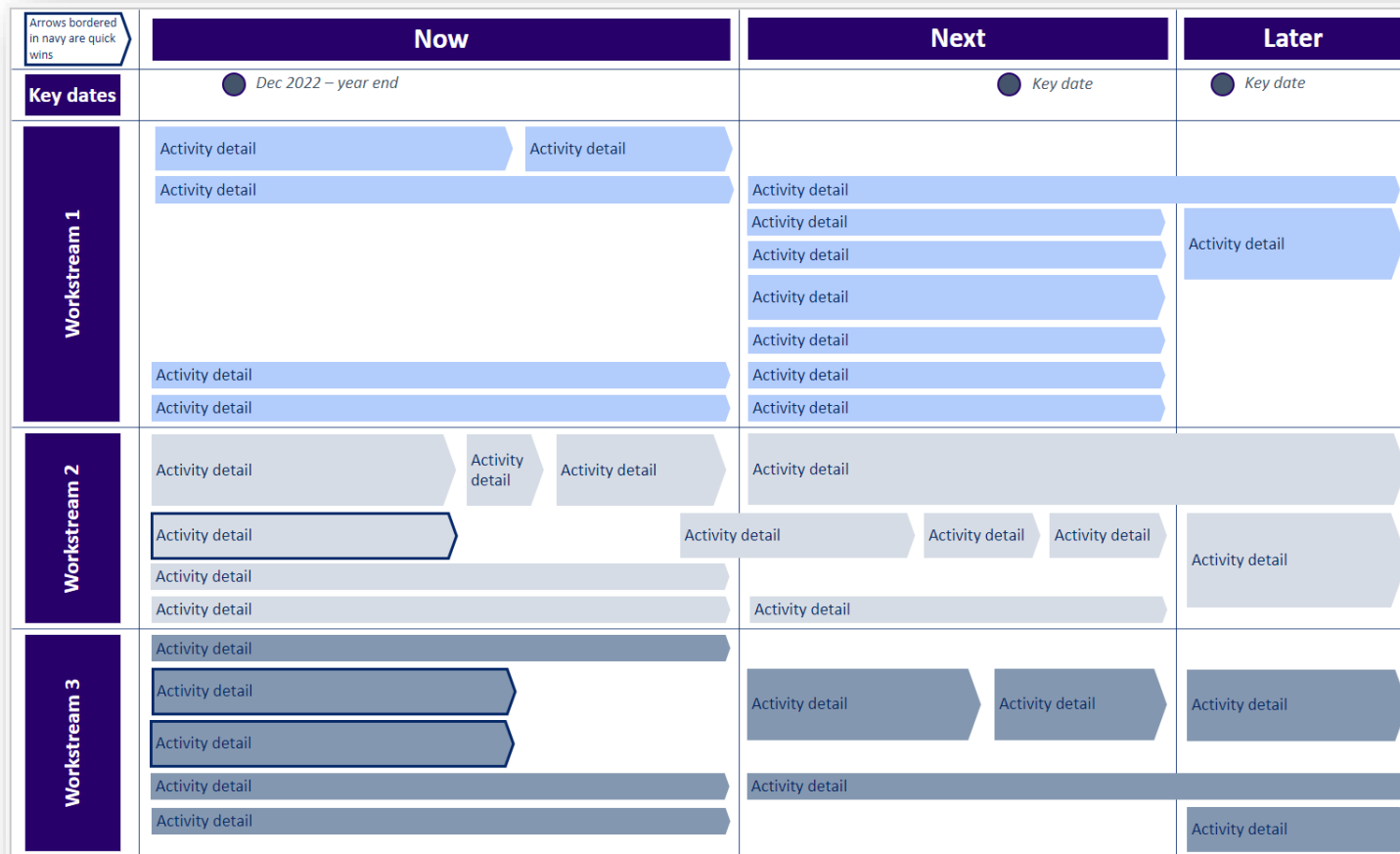
is a solution that addresses these challenges

- ➔ It's a practical **one day working session**
- ➔ **Bespoke** to your business and designed for B2B service-based businesses with 100-1250 employees
- ➔ Helps you develop a **prioritised roadmap**, identifying different work streams and quick wins
- ➔ Establishes a set of principles for **how to deliver change** in a manageable way
- ➔ Gives clarity on where **budget and external support** will be needed

Deliverables

PRIORITISED ROADMAP specific to your business so you know where to start

This is presented as an **easy-to-understand, visual roadmap** in Powerpoint for you to update as you make progress



This roadmap is supported by slides which set out:

- Top level objectives for each phase
- A set of principles, aligned to your culture and ways of working, on how to implement the roadmap
- Where investment of time and/or money is needed to deliver the roadmap
- Where external support is needed to deliver the roadmap
- Where external support could accelerate delivery of the roadmap

Our initial planning is across three time periods

Now	Next	Later
To xxxxx	xxx to xxxx	xxx onwards
What success looks like	What success looks like	What success looks like

The activities for 'now' are defined – those for next and later will become more specific as we get nearer to those time periods and have more clarity on priorities and context.

Implementing the roadmap: principles for change

- Principle 1
- Principle 2
- Principle 3
- Principle 4

Where external support could accelerate progress

Area 1	Area 2	Area 3	Area 4
• Specific activity detail • Specific activity detail	• Specific activity detail • Specific activity detail	• Specific activity detail • Specific activity detail	• Specific activity detail • Specific activity detail

Our approach

PREPARE

WORKING
SESSION

CREATE

REGROUP



PREPARE

Through introductory calls with key members of your team and by reviewing relevant internal documents you share with us, we familiarise ourselves with your business. This preparation allows us to plan a bespoke one-day working session, ensuring we maximise the value of our time together.



WORKING SESSION

We facilitate a one-day working session for your team, including the senior leader. During this session, we get all your ideas out on the table, identify additional activities, prioritise them and break them down into manageable chunks. We also help you understand how to deliver change in a way that will work for your business.



CREATE

We create your roadmap together with supporting slides, following your brand guidelines, so you can use this document for internal communications. This document is in Powerpoint format, allowing you to easily add to and update it as needed.



REGROUP

Follow up meeting to review the plan and agree next steps.



Case study – creating a roadmap for Saffery

Situation

Saffery is a partner-led and people-focused top 20 accountancy firm in the UK. In July 2022, they set an intention to become a Responsible Business. An important part of their journey was realising that being a Responsible Business isn't about how they spend their money, but how they make it. Therefore, a key focus was working with the business to identify where they could use their skills and experience as accountants to have a positive impact.

When they came to us in February 2023 the core Responsible Business team had learnt a lot about Responsible Business but were unsure about what steps to take next. They asked us to help them with two specific challenges:

- Planning and creating an approach to Responsible Business that was suitable for an accountancy firm of their size and nature, and in a rapidly changing area where there is no blueprint; and
- How to engage and communicate with the Management Board, partners, and whole staff team, including involving them in carrying out a materiality assessment.

Approach & results

We ran a one-day Clarify session to scope out a programme of work and create a prioritised high-level roadmap.

- **Clarity** on their level of ambition for the next three years
- **Prioritised plan** with guidance on where to invest time and money to deliver the plan, which gave the team clarity on what to focus on and when
- **Confidence** to implement the plan
- An **approach to change** that aligns with their culture, enabling them to sustain change for the long-term

“

The combination of Hannah's expertise and Nicky's change knowledge allowed for a really productive session, which gave us the clarity on the next steps as well as some long-term vision. It consolidated our learning and ideas into action.

Having that outside perspective in a focused manner was very valuable allowing real clarity of thought. The summary document that followed it up then meant we had a tool to educate others in the business. It enabled us to be set up for the next 12 months.

”

Ruth Evered, Responsible Business Director

Book your GET CLARITY call now!

This 30-minute call is for the CEO or senior leader within B2B service-based businesses with 100-1250 employees that want to continue the transition to being more sustainable.

GOAL Identify whether a one day ‘CLARIFY’ working session could give you the clarity you need to move forward and create a meaningful impact through your business.

METHOD We will discuss your journey to date and explore your vision and objectives. Then, through a series of questions, we will uncover what’s preventing you from making the progress you want.

OUTCOME You will leave the session knowing whether The Spiral Hub can help you gain the clarity you need on how to take your business’s sustainability to the next level.

Email me to book or with any questions – nicky@thespiralhub.com