

# ELEVATING BUSINESS VALUE WITH STRATEGIC EXCELLENCE:

## THE 40 STRATEGY™ APPROACH

Led by Carl J Cox, 40 Strategy™ empowers businesses to increase value and achieve sustainable growth through data-driven strategic planning. Here we learn how the Oregon-based company helps companies unlock potential, improve efficiency, and secure long-term success.

For countless business owners, their company is not only their life's work, but their primary source of wealth. In fact, as much as 90% of an owner's retirement wealth can be tied up in their business. Despite this, when the time comes to sell or transition, many owners struggle to understand the potential value of their company. Whether due to a lack of planning, ineffective strategies, or stagnant growth, too many businesses fall short.

This is where 40 Strategy™ steps in. Dedicated to helping business owners unlock value, scale sustainably, and build resilience, Carl J. Cox's innovative approach combines cutting-edge tools with practical expertise. By addressing the unique challenges of each business, 40 Strategy™ ensures its clients not only achieve their immediate goals but also set the stage for long-term success.

### A new approach to business strategy

Traditional management tools—like SWOT analysis or Porter's Five Forces—have long been staples in strategic planning. While useful for providing a broad

overview, these methods often fail to deliver the actionable insights and precise execution plans businesses need in an increasingly crowded and competitive marketplace. This gap between planning and implementation is a key reason why 90% of strategic plans fail, according to industry research.

40 Strategy™ bridges this gap by offering a hands-on, data-driven approach. The consultancy goes beyond surface-level analysis, helping businesses identify key growth opportunities, assess risks, and develop tailored strategies that yield measurable results.

Whether an owner plans to sell their business, pass it on to the next generation, or simply grow it to secure their financial future, **strategic clarity and precision are non-negotiable**. The team at 40 Strategy™ understands this, and their mission is simple: empower businesses to increase value, sustain growth, and achieve long-term success.

### The 40 Strategy™ Toolkit

Central to the company's methodology is its **\$4M Strategy™ Growth Assessment**. This proprietary tool evaluates a business's potential across 40 critical levers, providing a clear roadmap for improvement. Unlike traditional methods, the \$4M Strategy™ focuses on quantifiable outcomes, ensuring that every recommendation is tied to a tangible increase in value.

Key services offered by 40 Strategy™ include:

- **\$4M Strategy™ Growth Assessment:** A comprehensive evaluation of growth opportunities and value-enhancing strategies.
- **Strategic Planning:** Development and implementation of custom strategies tailored to a business's unique needs.
- **Performance Coaching:** Guidance and accountability support to ensure teams stay aligned with goals and key performance indicators (KPIs).

### How the \$4M Strategy™ Works

The \$4M Strategy™ Growth Assessment begins with a detailed evaluation of the business's current operations and growth landscape. This involves identifying internal and external factors that may be hindering performance, such as inefficiencies, market challenges, or untapped opportunities.

From there, 40 Strategy™ works closely with the business owner and their team to pinpoint areas with the highest potential for value improvement. Each area is quantified, providing a clear picture of the potential financial impact of specific strategic changes.

Finally, the consultancy develops a custom strategic plan that focuses on high-impact initiatives. This plan is not only actionable but also designed to deliver measurable outcomes, ensuring that every move contributes to the business's overall growth and success.

### Unlocking value through data-driven insights

One of the key strengths of the \$4M Strategy™ is its reliance on objective data. Unlike traditional planning tools that can be overly reliant on assumptions, this methodology uses concrete metrics to guide decision-making. The strategy looks at specific improvements in areas such as:

- **Operational Efficiency:** Streamlining processes to reduce waste and improve productivity.
- **Market Positioning:** Identifying and leveraging competitive advantages.
- **Financial Performance:** Enhancing profitability through targeted initiatives.
- **Scalability:** Preparing the business for growth by addressing structural or procedural limitations.

This data-driven approach not only ensures accuracy but also builds confidence among stakeholders, providing a clear rationale for each decision.

### Case Study: Transforming Terrane Surveying

The story of **Terrane Surveying** highlights the transformative impact of the 40 Strategy™ approach. Based near Seattle, Washington, the land surveying firm had established a strong reputation for quality but found itself struggling with operational bottlenecks and stagnant growth.

Despite its success, Terrane's projects were taking up to 140 hours to complete, largely due to inefficiencies in its processes. Surveyors were bogged down with administrative and logistical tasks, leaving them unable to focus on their core expertise. Meanwhile, the company lacked a clear strategy for scaling operations, leaving CEO Kenny Green frustrated and feeling stuck.

### Diagnosing the problem

When Terrane partnered with 40 Strategy™, the first step was identifying the root causes of their inefficiencies. Through the \$4M Strategy™ Growth Assessment, it became clear that the com-





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high-level strategy, ensuring the company's continued success.

**Beyond strategic planning**

While the \$4M Strategy™ is a cornerstone of 40 Strategy™'s approach, the consultancy's services extend far beyond just planning. Performance coaching is another key offering, helping businesses stay on track and ensuring that strategies are executed effectively.

The team also provides ongoing support, working with clients to adapt their plans as circumstances evolve. This flexibility is crucial in today's dynamic business environment, where opportunities and challenges can arise unexpectedly.

**Preparing for the future**

For business owners, the stakes have never been higher. Whether planning for retirement, preparing for a sale, or aiming to achieve new levels of growth, having a clear and actionable strategy is essential.

40 Strategy™ provides the tools, insights, and support needed to navigate these challenges and unlock a company's full potential. With a proven track record of success and a commitment to data-driven excellence, the consultancy is helping businesses across industries achieve their goals and secure their futures.

The 40 Strategy™ approach is all about sustainable success. By focusing on measurable outcomes, actionable insights, and hands-on support, the consultancy empowers businesses to thrive in a modern business landscape.

**For business owners looking to elevate value and unlock long-term growth potential, 40 Strategy™ offers the expertise and tools to make it happen. Whether through the \$4M Strategy™ Growth Assessment or tailored strategic planning services, 40 Strategy is redefining what's possible for businesses at every stage of their journey. To find out more, visit <https://40strategy.com/>**

pany's workflows were unnecessarily complex, with team members often duplicating efforts or working outside their areas of expertise.

**Implementing solutions**

40 Strategy™ worked with Terrane to streamline operations and clarify team roles. Surveyors were freed from administrative tasks, allowing them to focus on their technical skills, while other team members were assigned to handle logistical responsibilities.

Next, the company implemented regular accountability check-ins and estab-

lished clear Key Performance Indicators (KPIs). These changes not only improved efficiency but also fostered a culture of accountability and collaboration.

**The results**

The impact was immediate and significant. By reducing project times from 140 hours to just 40, Terrane was able to complete over 500 additional surveys within a year. Sales increased by 40%, and the company set the stage for sustainable, long-term growth.

Thanks to 40 Strategy™, CEO Kenny Green was able to shift his focus back to



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