



# Case Study:

## Boardroom and Executive Briefings

### Overview

The ever-changing economic landscape means that effective strategic planning has never been more important. In 2019, a prestigious property investment and management company engaged Oxford Economics' Boardroom and Executive Briefing Service to support its annual strategic planning process.

### The client's challenge

In previous years, our client has engaged different companies to provide (a) data and modelling (b) the discussion with the executive team, and (c) the final presentation to the board.

As a result, the data and advice that our client received during the planning phase and later during the presentations risked being internally inconsistent both year-to-year and throughout the annual process. The client has identified that this inconsistency could confuse decision-making and potentially undermine the confidence of their stakeholders in the planning process.

### The solution

Our client wanted to bring consistency to the different elements of their strategic planning process, and so in 2019, the client engaged Oxford Economics' Boardroom and Executive Briefing Service to support it. The client chose Oxford Economics because:



Oxford Economics' Boardroom and Executive Briefings service offers access to incisive briefings on the key economic issues of the day, and their crucial business implications, from Oxford Economics' most senior and experienced economists.



The analysis is based on Oxford Economics' globally consistent economic model. The model drives all of our forecasts at macro, regional, city and sector level.



Briefings are customised to our client's needs and unique circumstances, looking closely at the issues that matter most for the business and sector.



Our Boardroom and Executive Briefings service is led by Ian McCafferty, Senior Adviser. Ian is one of the UK's best-known business economists and among its most influential economic commentators and former policymakers. Ian's unique experience in business, financial markets and government allows him to present to the most senior stakeholders with authority, conviction and complete independence.

### Background

Once a year, our client reviews its 10-year strategic plan, revising it based on such factors as:

- The key economic drivers of growth
- Secular trends and issues of importance to their business
- Outlook for specific regions and cities, as well as the outlook for key sectors
- The external risks and opportunities to its business

The client's plan is then reviewed by the executive team, before ultimately being approved by the board.

## The result

With Oxford Economics' Boardroom and Executive Briefing Service, the client was able to undertake its strategic planning process with a single economics firm, ensuring that the advice and insights it would be relying on to drive the business forward for the next 10 years were internally consistent and clearly communicated to their executive team and board.

- **Discovery session:** A team of two Oxford Economics economists, including Ian McCafferty, interviewed the client's Head of Planning to learn more about the business and their strategic planning process
- **Presentation and discussion with the executive team.** A senior Oxford Economics' economist with specialism in the client's area of business presents to the executive team
- **Presentation to the board.** Ian McCafferty presents to the board

### A presentation includes:

- An overview of the macroeconomic outlook and sectoral and regional overviews of importance to the client
- A review of key structural drivers and issues influencing the client's business
- The key economic risks to the client's business, including forecast timelines and probabilities and an analysis of their effects
- Longer-term outlook

All based on a deep understanding of business needs and requirements.

## Why Oxford Economics?

**A trusted brand.** An acknowledged world leader in global forecasting and quantitative analysis, our roster of over 1,500 clients includes leading companies across a range of industries, from consumer goods and retailers, to industrial manufacturing and energy, and to financial institutions and professional services.

**An objective, independent view.** As a privately owned firm, you are assured that our analysis comes with no political or institutional bias.

**Calibre of staff.** Our team of more than 200 economists and analysts have extensive industry, financial, and public-sector experience and are expert at applying advanced and innovative economic and research tools to provide valuable insights into today's most pressing business, financial, and policy issues.

**Quantitative rigour.** We have long been a leader in quantitative analysis with over 35 years of experience conducting evidence-based research. Our clients rely on our services for business-critical activities such as forecasting, scenario framing, risk assessment, policy analysis, and market sizing.

**Accuracy of our analysis.** Drawing on the most reliable, up-to-date data and leading-edge quantitative framework ensures accurate and timely analysis. Our forecasting track record is one of the best in the industry.

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