

STARTUP STRATEGIC PLANNING

# How Startup [Re]start Got the Clarity & Confidence it Needed to Move Forward and Become Reality





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I had this idea for a company I had already begun, but I found it hard to get clarity. Was this something worth pursuing? Did I even have a real company here?

So my investment in David was like having a second-in-charge president, chairman, and CEO who I could use as a sounding board and as a guide through what was scalable and realistic.

**While I could articulate my vision, it really was David who made it real.** He helped me clarify everything on paper, which gave me the answers I was looking for to go make it happen.

CHAD SILVERSTEIN

CEO, [RE]START

## THE CHALLENGE

# Determining the viability of a new business idea & clarifying its model

Chad Silverstein, a multiple-time-over entrepreneur, was in startup mode.

“I had this idea for a company I had already begun, but I needed to clarify the business model and had a lot to figure out.

**Was this something worth pursuing?  
Did I even have a real company here?  
If so, what was the value?”**

Chad’s idea was for a unique service called [re]start, a career development and job-matching platform that would connect individuals in collections with new job opportunities so they could pay their bills. Despite the potential behind the idea, Chad was overwhelmed and struggling to make what was in his head real.

“The service I had in mind for [re]start was very strong, but I’m not a process-driven person. I’m a visionary, and thus not the person who is going to sit down and write a business plan.

And at this point, I was just too close to the business. I think any entrepreneur would agree that you can’t do it all yourself, so it was obvious I needed help from someone who had the unique ability and experience overcoming what I was challenged with. In other words, someone who could see my blindspots and give me an objective perspective on the gaps.”



**As someone who Chad had known and trusted for years, David seemed like the logical choice for the job.**

“David and I have a lot in common, and I was initially drawn to him because of his philanthropic work and growth mindset. And when we started collaborating and sharing resources, I realized he has a huge ability in this area that I didn’t have but wanted access to. So I chose to partner with him and Panoramic Strategy on this engagement so I could tap into this ability and leverage it with what I was trying to do with [re]start.”

## Solidifying the business and making it real through a “knowledge capture” process

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From there, Panoramic Strategy set off on a process that included a full review of [re]start to capture all existing knowledge, the building out of some growth scenarios, and the development of the roadmap forward.

The goal of this process was to organize the many thoughts swirling around in Chad’s head, see what the financial impact of each was, and put it all down on paper so Chad had clarity around the bigger picture.

“As a solo entrepreneur, I didn’t have the resources to have a team. So my investment in David was like having a second-in-charge president, chairman, and CEO. And even if he wasn’t any of these things in reality, he was still able to come in and provide just as much value as a partner would.

This meant I was able to use him not only as a sounding board, but as someone who could guide me through what was scalable and what could realistically be done.”

Chad and David’s time together involved lots of “digging deep” to eliminate and fill in any potential gaps upfront that could get in the way of [re]start’s later success. It wasn’t always

an easy process, but it was one that Chad found invaluable in solidifying his business.

“David did not make it easy, but that’s one of the things I love about David: his ability to dig deep, even if it hurts.

He challenged me to make sure I was able to articulate not only what I had, but what I was going to do with it. This was an incredibly valuable exercise that really helped me solidify the business.”

## THE RESULTS

# Developing full confidence in [re]start's path forward & clarity over the key actions and financial drivers that would deliver success

Several months later, Chad was able to walk away with the full confidence that [re]start had a path forward (as well as a clear idea of what that path could look like).

"The end result of my time with David was an executive summary and the foundation of a business plan that outlined key actions and financial drivers. And about 4 years later, we're actually doing exactly what David and I put together.

**So while I had the vision, it really was David who was able to help me make it real.** He was the one who put it down on paper and challenged me to close the gaps that were causing confusion and conflict.

The only reason someone shouldn't hire David is if they already do exactly what David does. He's got the CFO background, the business strategy piece, and the consultant edge that brings a whole array of expertise to the table to help any business with plans

to grow. But what really sets him apart is his heart; he goes into everything he does with all of it."

