



VENTURITY'S TURNAROUND: HOW A TEAM OF ACCOUNTANTS REBUILT THEIR MARGINS, CULTURE, AND CONFIDENCE

In 2017, Venturity Financial Partners aimed to solve a problem that had puzzled them for years: how to consistently grow profitability. The Dallas-based provider of Accounting and CFO Advisory services had smart people, increasing revenues, and decades of industry experience. But when it came to gross margin—arguably the most important indicator of financial health for a business like theirs—they were stuck.

“We were hovering in the low-to-mid-30s for years,” says Shelly Strother, Director of Accounting and a 22-year veteran of the company. “We knew we were leaving too much on the table.”

The leadership team decided it was time to implement a company-wide shift—not just in strategy, but also in mindset. They focused on boosting operational efficiency, clarifying roles, and uniting the company around shared financial goals. Most importantly, they chose to include everyone in the conversation about how the business generates profitable revenue. That decision—to teach the whole company how to think like owners—would transform everything.

FIXING MARGINS FIRST

One of the initial changes the team made was to stop thinking in silos. Historically, each internal team was measured by its own profitability benchmarks, but there wasn't a clear, shared company-wide goal. “You could hit your team goal but still miss the bigger picture,” says Strother.

So, leadership introduced a single, company-wide gross margin target: 40%. They began holding regular financial Huddles, where the numbers were shared and explained. Instead of reports going to just a few senior leaders, everyone saw the same financial data and contributed to weekly forecasts. “It wasn't just about reporting,” Strother says. “It was about learning what the numbers meant, and how our day-to-day work influenced them.”

Within months, Venturity started to see results. Gross margin increased from 35% to 40%, then to 45%. By 2024, they were consistently hitting 48-50%, peaking at 52% in some months. The transformation wasn't solely about new clients or higher prices. It came from optimizing how the work got done.

Venturity reorganized teams to better match talent with capacity. They strengthened their partnership with an offshore team in India. They conducted training and MiniGames to transfer more client work to that group, allowing U.S. team members to concentrate on strategic client conversations.

A MiniGame is a short-term, company-wide initiative designed to achieve a specific goal, often using creative themes, team competition, and visible scoreboards. It's a key tool within The Great Game of Business framework—intended to make business improvement both engaging and measurable.

One such MiniGame focused on helping offshore team members handle a considerable amount of the client workload, while the U.S. team concentrated on relationship-building. Another tracked training transitions. “We wanted our offshore team handling the accounting, and our U.S. team managing the connecting,” Strother says. “That shift alone improved both service and profitability.”

The team also enhanced their forecasting accuracy and adopted a more forward-looking approach. They started projecting 12 months ahead—then expanded to five years—refining forecasts and linking them directly to hiring decisions and resource planning. “It wasn't always perfect,” Strother notes, but “we started catching issues early and adjusting in real time.”

BUILDING A CULTURE THAT COULD KEEP UP

As the financial engine of the business became more efficient, another transformation was happening—one that would make Venturity not only more profitable but also more human. With increased visibility into the data, there was a stronger sense of shared purpose. Employees at all levels began taking part in company-wide planning. Scoreboards made performance clear and easy to understand. Team members started leading MiniGames to tackle issues like employee engagement, marketing reach, and capacity utilization.

One MiniGame, inspired by Grease's “Summer Lovin’,” was played in the summer of 2020 when everyone was working from home due to COVID. The goal of the game was to keep engagement and morale up since we could not physically be together. Another, called Venturity Network, focused on boosting LinkedIn engagement—and ended up raising the team's business development awareness.

Even Venturity's offshore partners joined in the activity. “We started involving them in MiniGames and Huddles, and they got excited,” says Strother. “They started asking how they could create their own version of GGOB.”

As operations improved, morale also increased. The team established a “Wellness Squad” that organized quarterly health fairs and social gatherings. They even created a personal finance discussion group where employees could share financial goals and strategies with peers—completely voluntary, but growing in popularity. These weren't perks; they were the result of a healthier, more stable company. “We weren't just grinding to survive anymore,” says Strother. “We had the space to focus on our well-being, too.”

TURNING EMPLOYEES INTO OWNERS

In 2020, Venturity made another significant move: it became a 20% employee-owned company through an ESOP transaction. Suddenly, the numbers employees had been tracking for years took on new importance. Net income didn't just influence bonuses; it affected company valuation. And valuation determined the size of each employee's ESOP account.

In weekly Huddles, the team introduced a new metric: how net income impacted projected distributions. For many, it was the missing piece that made the entire system function. "People started making the connection between their decisions, our income, and their ownership," Strother says. "It wasn't abstract anymore."

The company has maintained its focus and commitment to developing leaders within its organization by providing opportunities and investing in training for its team members. "Hierarchy takes a backseat to collaboration here," says Strother. "That's how we win."

TURNING EMPLOYEES INTO OWNERS

Venturity's transformation didn't come from a single tactic or breakthrough. It resulted from a continual commitment to education, transparency, and shared accountability. Playing The Great Game of Business gave them the framework to maintain those commitments. It wasn't the strategy—it was the operating system that allowed the strategy to take hold and grow.

And they thrived. Since implementing GGOB in 2017:

- Gross margin has grown from 35% to over 50%
- Revenue has nearly tripled, crossing \$13 million in 2025 projections
- Net income has increased 40-50% annually the last two years
- ESOP valuations and bonus payouts have risen in parallel
- Employee engagement, retention, and morale have all improved

“ IT'S A COMPLETELY DIFFERENT COMPANY NOW, NOT JUST BECAUSE OF THE NUMBERS, BUT BECAUSE OF HOW WE WORK TOGETHER. PEOPLE SPEAK UP. THEY SHARE IDEAS. THEY CARE ABOUT THE OUTCOME. THAT'S NOT JUST BUSINESS SUCCESS—IT'S EMOTIONAL SUCCESS. ”

**— SHELLY STROTHER,
DIRECTOR OF ACCOUNTING**