

# Case Study:

## Developing a Smart Corporate Social Investment Strategy

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### Who

**Enterprise Group Limited (EGL)** is a financial services company that provides life insurance and general insurance products; administers pensions schemes as a corporate trustee; offers real estate and facilities management services; and operates a comprehensive funeral service business. EGL's aspiration is to deliver exponential growth that generates sustained profits for the benefit of all their stakeholders.

### What

As part of its mission and to contribute to achieving its business objectives, EGL needed to develop a Corporate Social Investment (CSI) strategy with defined and measurable impacts and outcomes, which would differentiate EGL from its competitors.

EGL engaged Kina to assist them in developing their 5-year Social Investment strategy.

### How

The process started with Kina carrying out research on EGL to understand its business objectives and value drivers; challenges in meeting its objectives; business risks and mitigation measures; organisational strengths and challenges; its current CSI strategy and programmes, their effectiveness and impacts; and what their competitors were doing to better position themselves through their CSI activities.

With that information, Kina designed and delivered a half-day tailored and interactive *Kina Corporate Social Investment Strategy Masterclass* for EGL's Executives and Senior Management to explore their role in developing a smart Corporate Social Investment (CSI) Strategy that is commercially focused, delivers business value, supports the company's Social Licence to Operate (SLO) and achieves measurable social development outcomes.

The result of the workshop was a corporate decision on the social investment models and themes for EGL. Based on this decision, Kina was asked to support the Group in developing the CSI strategy and in working with an internal team within the company to design and deliver a flagship CSI programme under the strategy.

### Result

EGL now has:

- a five-year CSI strategy that will contribute to achieving its business objective by being linked to three of its business value drivers - building a consumer-centric company to nurture a world class brand; cultivating an innovation culture to lead with ideas; and nurturing, empowering and inspiring employees to meet current and future market needs. The strategy includes - an SI policy that sets the Group's SI themes and categories of Social Investments; the criteria for determining which SI projects to support in each category; and the governance for supporting and implementing SI projects – including how to manage risks associated with the SI strategy.
- A Flagship programme focused on financial literacy designed to educate young people, their parents and teachers on managing their finances and to introduce them to EGL as a provider of financial services.

*“Kina Advisory's expertise in corporate social investment is unquestionable. With their guidance, we developed a CSI strategy that ensures our projects are sustainable and implemented in line with international best practices. Kina handholds without creating dependency. They are one of the most professional teams I have had the privilege of working with.”*

**Phyllis Woode-Nartey**, Head, Group Communications and Synergies, Enterprise Group Limited.

## How to engage us

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To discuss your requirements, please contact us by sending an email to Elizabeth Arthur at [elizabeth@kinaadvisory.com](mailto:elizabeth@kinaadvisory.com) or to [info@kinaadvisory.com](mailto:info@kinaadvisory.com)

For more information about Kina Advisory, please visit our website [Kina Advisory](https://www.kinaadvisory.com).