



A PETRA CASE STUDY

New Energy

Nationwide team with strong cultural alignment

INDUSTRY

Solar Energy

EMPLOYEES

100+

HEADQUARTERS

Annapolis, MD

THE CHALLENGE

New Energy Equity had a high-growth model and strong leadership, but needed more structure to scale sustainably. The executive team was local and tight-knit, but as the company grew, complexity increased. Communication and accountability were stretched, especially as they began to acquire new companies and expand nationally. Private equity investors saw the opportunity and brought in Petra to professionalize operations, streamline planning, and increase enterprise value in preparation for a future exit.

Petra's Impact

- Core values defined and embedded across the organization
- Monthly KPI reviews standardized by department
- “Worth Doing Wrong” culture embraced company-wide
- “Petra Planning” integrated into company vocabulary

RESULTS THAT MATTER

300-400%

Gross Margin Growth over 5 Years

\$165M Acquisition

Acquired by Public Company ahead of PE's Schedule

Office Expansion

(4) National Office Expansions

“ The hiring of Petra with a five-year plan of being able to exit in three is really a great testament. And carrying forward all of those habits after the acquisition just shows how valuable it is. ”

- Josh Kunkel, President, New Energy Equity

Petra helped New Energy Equity build the structure, discipline, and alignment needed to accelerate growth, scale its culture, and drive a successful exit ahead of schedule.

With executive coaching, quarterly planning, and clearly defined priorities, the company grew 300–400%, implemented company-wide accountability systems, expanded to four offices, and was acquired for \$165.5M by a publicly traded utility. Petra’s process became so ingrained, the acquiring parent company hired Petra for their own team.

Strategic Planning Rhythm: Petra introduced quarterly and annual planning sessions to align the company on 3-5 top priorities. These sessions remain a foundational part of their operating rhythm today.

Meeting Cadence: Daily and weekly huddles were implemented company-wide to enhance communication across time zones and teams.

Company-Wide Visibility: Goals were published and visible on TV screens, newsletters, and team communications.

Departmental Expansion: While quarterly planning started with the executive team, every department now runs its own Petra-style planning cycle.

Celebrating Wins: New Energy Equity built momentum by celebrating quarterly progress—Air Force Ones, private chefs, movie theater buyouts, and more.

Petra has helped hundreds of companies and thousands of individuals create scalable organizations, better teams, and happier, more fulfilling lives for themselves.

Contact us today to see how we can help you grow your business!



petracoach.com