



A PETRA CASE STUDY

Vertican Technologies, Inc.



INDUSTRY

**Legal Recoveries
Software**

EMPLOYEES

60+

HEADQUARTERS

Fairfield, NJ

THE CHALLENGE

Vertican was a long-established, closely held technology company serving the legal collections industry. While the company had deep expertise and loyal, long-tenured employees, it lacked formal structure around strategy, priorities, and leadership development. CEO Isaac Goldman, an entrepreneurial leader, sought guidance to professionalize operations, build alignment, and implement a clear planning system to fuel growth and improve communication across a dispersed and hybrid workforce.

Petra's Impact

- **Daily huddles** connected teams across 14 states and 5 countries.
- **Core purpose and core values** were uncovered and embedded company-wide.
- **Rock Habits score doubled** (45 → 85.7) with improved execution.
- **eNPS +55**, reflecting stronger culture and engagement.

RESULTS THAT MATTER

30%

Revenue Growth

+55 eNPS

Highlighting employee satisfaction and cultural strength

Improved
Profit Margin

“The daily huddles probably saved our business during COVID. We’ve done them consistently ever since, and they’ve been one of the major benefits of Petra and the Rockefeller Habits.”

- Isaac Goldman, CEO, Vertican Technologies

Before Petra, Vertican operated as a closely held, fast-moving business without consistent structure or visibility. Communication gaps existed between departments, priorities lacked alignment, and leadership was self-taught, managing growth without a clear framework.

Working with Petra, the company transformed with daily huddles connecting a dispersed workforce, clear core values uniting the team, and planning rhythms driving accountability. Execution strengthened as Rockefeller Habits scores doubled, leadership communication improved, and culture flourished with an eNPS of +55—all fueling 30%+ revenue growth and a stronger, more scalable organization.

Strategic Planning Rhythm:

Established quarterly and annual planning sessions to set and track priorities.

Meeting Cadence:

Cascading daily huddles introduced across the organization, ensuring company-wide visibility and connection.

Goal Visibility:

Alignment through company-wide access to priorities, targets, and KPIs in Align.

Cultural Discovery:

Uncovered Vertican's core purpose of *improving people's lives* and codified values rooted in their legacy.

Leadership Development:

Identified leadership gaps and established accountability

“The best athletes in the world have coaches. A coach helps you see blind spots, push further, and grow faster. That’s exactly what Petra has done for us.”

- Isaac Goldman, CEO, Vertican Technologies

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