

Case Study

Being First, Inc.

CHANGE PROJECT REVIEW

THE CASE:

Global Software Services and Solutions Company USA

The North American Sales and Marketing organization of a leading software, services, and solutions company leverages a “project retrospective” to deepen organizational learning, build change leadership skills, and better position future change initiatives for success.



Being First enables clients to achieve breakthrough results from transformation.

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Challenges

A change savvy SVP charted 12 change teams to address the limitations of an existing business model and structure, find new growth opportunities, increase efficiencies, and strengthen overall organizational performance. Within 6 months several of the teams had generated compelling recommendations. Rich dialogues between team leaders and executives clarified interdependencies between projects, and prioritized highest leverage changes, including a major restructuring. An end-of-year review with their new EVP was anticipated to result in clear direction, bold actions, and exciting new opportunities to make the recommendations a reality.

In the midst of a deepening economic downturn, the EVP made the decision to “only pursue low hanging fruit at this time.” Team leaders were disappointed by the slowdown, feeling that the estimated 6,000 man-hours already invested in the projects were wasted. The change process broke down: unclear direction, lack of communication, and year-end chaos.

Solutions

Being First was asked to help wrap up and capture the work of the teams in such a way that key learnings would be available for future change initiatives, decisions and their rationale clearly communicated, and change team leaders felt acknowledged.

Partnering with the Program Manager and internal HR/OD Director, an interview protocol was created, which simultaneously allowed participants to vent, gather and compare stakeholder perspectives, provide a common language for talking about change and educate everyone on best practices. It was designed as a “change history audit” to surface the patterns on how the organization works with change, and how change efforts often failed to meet expectations.

Phone interviews were conducted with 15 executives and approximately 20 team lead-

ers. Data was analyzed and synthesized, and conclusions tested with key stakeholders. The sponsoring SVP was coached in the design of an executive dialogue and debrief meetings with team leaders, emphasizing that his “way of being” would be crucial in allowing for healthy team dialogue, rather than the more predictable PowerPoint supported data dump and “blame game.”

Results

- Executives reported “our best ever strategic conversation, taking in tough feedback without finger-pointing, engaging in real dialogue and reflection, building a sense of team”
- The process highlighted what worked well and should be continued
- Change team leads were thrilled to be deeply engaged in a co-creating strategy, and were appreciative of the opportunity to work with executives in this way
- There was profound enterprise-level learning and deepening of perspectives on markets and the future
- The change process had improved from past change initiatives in terms of integration, phase gate coordination, and communications
- The process pinpointed specific issues, for which executives initiated targeted remedies

One year later, significant improvements have been made consistent with the recommendations from the “project retrospective”, and a reinvigorated sense of “one team working together” is present.

Being First's counsel was invaluable in helping me represent our learning and opportunity to improve together - SVP, Sales & Marketing