

# Case Study

**Being First, Inc.**

## ORGANIZATIONAL HEALING: LISTENING

### The Challenges

Six months into their amalgamation, the new credit union began planning a process to involve all employees in co-creating the corporate vision and values. As this initiative was underway, the organization was confronted with a situation, seen by members and employees as a breach of ethics and trust by the CEO and Board. A flood of negative op eds, public outrage, and employee grief ensued. The initial response by the Board and CEO was containment: down playing the issues, denying any wrong-doing, shutting down the employee blog site, hoping that the situation would resolve itself. Instead, it became a flash point for pent-up frustrations about the merger process, resulting in the CEO's resignation.

The team of executives working with *Being First* recognized the crisis as a platform for modeling the organization's envisioned culture and "new way of leading." Several had completed *Being First's* change leadership programs and saw the need to more compassionately address the human dynamics inherent in the situation—to restore trust and faith in the future.

### Solution

To help the credit union move beyond "damage control" toward organizational healing and restored momentum, *Being First* proposed a strategy of visible and immediate action by the leadership team. This required them to model active engagement vs. containment, attend to the human/emotional aspects of change, and support their people. Specifics included:

- Healing before building: putting the vision/values work on hold until it could be done with integrity and full commitment

- Implementing a series of cascaded listening sessions lead by managers, which touched all employees within a two week period of time
- Coaching managers on the human dynamics of change and how to actively listen and facilitate dialogue
- Ensuring candid, authentic, and timely face-to-face communication by the new CEO and executive team—using their shared experience as an example of "why values matter"

### Results

The new CEO personally visited sites across the province, acknowledging what he learned from the listening sessions, addressing questions and concerns, and committing to specific remedial action.

- The employee blog site was reopened. Within a few weeks employee feedback turned to "thanks for listening, now let's get on with it."
- Over the next two months, 200 employees volunteered to facilitate local vision and values dialogues; 169 such dialogues were held with nearly full workforce participation; over 80% of the employees attended an optional Sunday afternoon event to select and define the values that should guide the credit union's future
- Employees are playing a key role in the follow-up "Making our Values Real" initiatives
- Managers at all levels are getting more in-depth training on how to support their employees through change

#### THE CASE:

#### A Canadian Credit Union

Alberta, Canada

**In any complex change, breakdowns and course corrections will occur.**

**THAT they will happen is a given.**

**HOW they are responded to is the make or break factor in determining whether problems result in upset, blame and cynicism, or in deepened alignment, commitment, and teamwork.**



Being First enables clients to achieve breakthrough results from transformation.

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***Being First has been a lifesaver during this time of shifting gears and emerging new priorities. You fully understand what we need and how to best deliver it.***  
***Jeff Mulligan, Chief Change Officer***