

Case Study

Being First, Inc.

THE POWER OF LISTENING

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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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 containm ent: 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 program s and saw the need to more com passionately 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. containm ent, attend to the human/em otional 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 com m itment

- 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 com m itting to specific remedial action.

- The employee blog site was reopened, Within a few weeks employee feedback turned to "thanks for listening, lets 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

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