

# Case Study

Being First, Inc.

## RE-VISIONING THE COMPANY

### Challenges

After ninety years, Detroit Edison (the largest subsidiary of DTE Energy) was facing possible de-regulation. The board decided to create DTE Energy as a parent company to increase the strategic opportunities to leverage Detroit Edison's expertise in non-regulated markets.

A new company purpose, mission, and vision were needed to drive change—but challenges existed:

- Significant resistance to change, with entrenched mindsets and behaviors in both leaders and staff; average tenure of its management was 27 years
- Adversarial relationships with both its unions
- Deep silo orientation among its business units; very little collaboration across functional areas
- Significant distrust between management and staff
- A culture of entitlement and control, when the future required empowerment and entrepreneurship

### Solutions

Being First suggested a high engagement visioning process be used to: (1) create the new charter, (2) align leaders, management, staff, and union leadership, (3) build commitment, and (4) initiate the required change efforts

- Prior to the visioning process, we put the top 300 leaders, in groups of 25-35, and both union leadership teams, through a four-day retreat to build leadership effectiveness, modeling, and people management skills
- We convened the Top 50 leaders in a one-day session to craft the first draft of the purpose and mission

- We convened a two-day visioning session with the Top 300 leaders to co-create the new charter. The retreat was highly choreographed, experiential, and crafted as performing theater so that it was emotionally engaging and impactful. Purpose, mission, and vision were finalized, along with strategic goals for each key initiative.
- All 10,000 staff were engaged in communication workshops to question, develop understanding, and build commitment to the new direction
- Change initiatives were executed with high staff engagement over the following years

### Results

This visioning process unleashed significant success in the company. Based on the vision, new acquisitions were made, new un-regulated businesses were developed, and the ground was set for significant culture change over the next three years.

- Top 300 leaders co-created the new company charter and fully owned its execution
- Vision statements that guided change in every area of the business were developed
- Staff was committed and understood the new direction and their role in it
- Union relations were harmonized, which led to 90% reduction in grievances and smooth contract negotiations
- Company surpassed its goal of generating \$100M of net income from newly created businesses catalyzed by the vision

#### THE CASE:

#### DTE Energy

Detroit, Michigan

Facing de-regulation, Detroit Edison (electric utility serving 2.2 million customers) and its new parent company, DTE Energy, needed to re-vision its company charter to ensure its future success.



Being First enables clients to achieve breakthrough results from transformation.

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*"Being First's design and facilitation of our entire visioning process re-energized our company and enabled us to achieve very significant goals we would not have achieved otherwise."*

*John Lobbia, CEO, DTE Energy*