

The
**Leadership
Partner**

Case Study – Managing Big Change in a Large Organization.

Real Life Testimony

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About Our Company

Formed in 1996, Leadership and Coaching Partner International (LCPI) is a people focused company offering partnership in coaching, leadership development, course design and large group programs across North America and Europe. Our unique and successful coaching techniques enable clients to expand their thinking, allowing them to see broader perspectives about how their personal style, behaviours, business relationships can better align with their natural skills and talents to deliver sustainable business results.

Our mission as “the leadership partner” is to help Leaders and their organization to be **sustainably successful**. Achievable and continued success involves two components: Leadership, to inspire and encourage change; and a Coach, to facilitate the change; Together we Partner and move towards the desired outcomes Internationally.

Our philosophy towards developing an organization is truly grounded in the principles of coaching. We guide the leaders and the organization to clearly articulate where they want to be. We raise awareness and honest clarity of the current situation so a plan can be developed to bridge the gaps. We foster the development of the skills, awareness or insights needed to close those gaps. Finally, we support the building of competencies that sustain the new behaviours and heightened levels of performance.

Then we move on.

We commit to making our clients self-sufficient, strong in their core and solid in their performance. Most importantly, we are committed to driving the critical business results needed by the organization through the power of its people.

Thank you for the opportunity to share our passion and expertise with you.

Case Study 4 – How Sofia approached a Europe wide organizational change.



Sofia is a veteran in the field of medical devices, having spent the last 29 years leading different verticals within a major multinational corporation. She successfully steered the finance division through a major change process, and as a result has been promoted to the leader of business development in a different vertical within the company. In this conversation she reflects on managing big change in large organization.

Sofia studied economics in university, and initially had no specific career plans, until:

“I remember seeing this company at a job fair, and they had a slogan written out, which really stayed with me. The slogan was ‘We create jobs around people’.”

“This wasn’t just a slogan. In my 29 years in this organization, I have been in 13 different positions. I have been given the space to shape my role here. It has allowed me to remain focused upon what matters most...of doing what’s right for the company.”

Sofia chose to create her own career free of stifling restrictions and strict job descriptions.

“It doesn’t work for everyone. It places a lot of personal responsibility on you, because it requires you to shape it--not how “you” would like it to be, but how it should be, and how it can help you, your colleagues and your team, and put them in a winning situation.”

“Focusing on your customers is important, but also, what’s important is your team. And this organization has supported me in doing just that.”

Q. What has been the difference in the work culture in these 29 years?

In her early years Sofia had no job description as such, she says.

“My company gave me the space to shape my role, and to keep doing what’s right for the company.”

“I was comfortable with that, because my company gave me the space to shape my role, and to keep doing what’s right for the company.”

That meant she could focus on the business of the company, and “thinking about market models and how to do better than the competition, as well as thinking about the new capabilities that we need to build.

“(I tell) my finance team, that they need to be the co-pilot of the business, that we need to own the business. It is crucial for all team members to realize that they have to fulfill that expectation. I have always been supported in my efforts to do that here, which...has kept me invested in this organization.”

Q. So what has changed over the years?

In the past, there were direct reporting lines, says Sofia.

We have now moved into what I would call a “multi matrix” setup wherein people report not just above, but also left and right across the organization structure.

“We have now moved into what I would call a “multi matrix” setup wherein people report not just above, but also left and right (across the organization structure) whether that be IT, finance, etc. So, I always tell my team, that it is absolutely essential that we make the organizational matrix work. So for me, it is about having the ability to set an example for our team, by collaborating with different parts of the organization, and making sure (they) collaborate successfully.”

As well as internal changes, Sofia has faced external forces, including the increasing pace of change and the wider use of technology.

“When I started 29 years ago, even the internet was not there. I found my first job here, through an advertisement in the newspaper. Now, we are connected all the time, and we need to make sure that we are equipped to handle that...there is an overflow of information.

“(For success) what’s needed is to be able to make sure that you are not being killed by all that information, and that you retain the ability to still see the larger picture, and maintain the high level position, and go deep when needed, while making sure that you are not suffocated with all the different tools...”

Q. When you try and engineer such a large shift, it does entail stepping on a few toes. So how did you handle that transition?

“We have always been a decentralized company, and we have prided ourselves on that.”

This change meant there were numerous different systems and processes. That was fine for the then decentralized company with different divisions. But four years ago, a decision was made to merge the products and services divisions. Each division had its own finance team. Sofia was given the responsibility of merging and rationalizing the finance teams.

It also meant taking on people from different verticals of the business and get them operating as one organization, says Sofia. This included moving finance functions from in-country units to in-house centers of excellence.

“I was appointed to be the chief financial officer for Europe for these two businesses which came together.”

“It meant that immediately we had to identify what would be our strategy from the business point of view, but also for me as the CFO, I had to solve the challenge of inheriting two separately led finance teams. And I had to bring these two teams together. And that meant having to look for opportunities to find synergies and optimized structures.”

“My starting point as CFO, was in an organization where I had 28 finance directors in the region! Three years later, we whittled that down to 14 finance directors in the region. So half of what I started with.”

“So the change program that I was trying to lead with my finance team...to embrace the end state model, and we are going to make it work. We are all going to embrace the one medical device (organization) and we are going to make it work. I want the finance leaders to be setting the pace for the rest of the organization in making this work.”

“Were we stepping on toes? Yes. Absolutely! We had to tell people that we will be doing things very differently to what we were doing in the past. We needed to tell many of them that they did not have a role anymore within this

(organization). I also wanted to take this opportunity, not only to optimize and bring these teams together, but also to bring new blood to the organization.”

“We reduced the number of finance directors by 50%. I was also bringing in new people who came from the two other divisions of the organization. Obviously, this had a big disruptive effect. We effected a pretty drastic change.”

Q. So what did you specifically do, that helped you with this transition?

Even after reporting structure changes, Sofia invited members of other leadership teams to be an integral part of her leadership team. It made the matrix work.

“Certain parts of (my leadership team) were no longer reporting directly to me. The financial transactions department for instance were now reporting to a different part of the organization. However, I still kept them as members of my leadership team, even though they were not directly involved, because I wanted to make this organizational matrix work. I needed them to know that, even if the reporting structure has changed, you are still part of my leadership team.”

“It is all about making the model work. It is about trying to make people collaborate better in a multi-matrix environment where people report differently. It is not always easy...but it is possible.”

Q. It's interesting that you got people from different departments into the same leadership team. It gave you fresh perspectives and built consensus, too right?

The upside of including matrixed members on the leadership team is the ease of sharing and developing talent across the matrix.

“This was the start of what we call a talent connected initiative. We have started to manage our finance talent now. We have over 2000 people in Europe, Middle East and Africa just in finance (across all verticals). We started to manage them as one pool of talent.”

“I am personally very proud of that. It’s an important way (to ensure) that finance becomes stronger and stronger in the organization, because this will help them get exposed to different environments.”

“It is important to develop our people. And that that is consistent (with) my experience over 13 different roles in this organization.”

Q. You were one of the first in your organization to jump across verticals. What was that experience like?

Sofia believes in gathering as much complimentary experience as possible.

“One thing I always wanted to focus on was to move in new areas of discomfort. It was to move into areas, new places where I hadn’t done work yet. Because I always felt that, the way I looked at my professional career, it has to be a varied experience.

“If you can do that well, then the likelihood is higher of you being able to get a higher role in the organization as you gain in experience.”

“I have been a CFO for the pharma business, I have been the CFO for the medical devices business In Europe. Now I have been asked to lead a big part of the commercial business. To be asked to do this new role was an unbelievable privilege for me.”

Q. Traditionally, change is viewed as a top down process, and one that is individually driven. In your experience, what were the challenges of ensuring its sustainability? How did you manage to institutionalize this?

With Merv’s help, Sofia and her teams started talking about the leadership changes they need to make as a collective, about demonstrating the right mindset in terms of working across different parts of the organization, as well as retaining intellectual curiosity.

“It’s not something that happens overnight. It starts with having a vision. You have to be clear towards your leadership team, about what kind of leadership behavior you should embrace together.”

One of Sofia’s corporate culture initiatives was to organize an annual multi-day, face-to-face meeting with the top 100 finance people in the region, both direct reports and other finance team members.

“...to talk about how we could collectively shape that (behavioral) change. Because...it is important to talk to people, to create a bond, an environment where people are willing to work with each other.”

“People also want to see that you are willing to walk the talk. They also need to see the benefit of that new approach personally, in terms of transfers, or promotions or activities. So we absolutely have invested a lot of time in communications, town halls, virtual town halls, bringing people together.”

“So we talked collectively, and aligned collectively on these leadership choices that we would embrace.”

Q. Could you give us an example of that?

“We started to reward people for living by those leadership expectations. We call it our quarterly choices awards. We hand these out in the organizations.

Sofia rewarded people for demonstrating the specific leadership behaviours the organization agreed to and felt where needed in the new structure. They called it Quarterly Choices awards.”

“Every quarter we ask our employees to nominate teams or individuals who embrace the Leadership Direction and demonstrate the Intention and Choices. It is a well laid out system where we get them to lay out their rationale for nominating (the recipients). They get a certificate, a \$200 voucher that they can use on a dinner date with a partner. “
“And in a town hall, we actually hand out these certificates. They are pleased and they can actually see their colleagues being recognized for living into the required behavior.”

“As Merv says ‘Culture is simply behaviours over time.’”

Q. In your opinion why do other organizations fail with respect to a culture shift? Why aren't others able to do the same?

Other companies, notes Sofia, might believe this has to be done in a much more prescriptive, project managed way.

The Culture shifts only when we are given the liberty to co-design and co-shape the future behaviours.

"It perhaps goes back to the point I mentioned earlier that we create jobs around people."

"I was not asked to do this. No one gave me a framework. But my company allowed me to shape and mold the way with my colleagues, rather than prescribe how things have to be done. There were very clear expectations with respect to the way forward. However, I said from the beginning, that we must be given the liberty to co-design and co-shape this.

"For me, this is not a change for the sake of change. When we make this change, the end place has to be a better place than where we are today. And the company has allowed that dialogue"

"We have to ensure that we don't drown out that individual voice that can help make things better. Because it is easy to drown that voice out, which is what we sometimes see in other companies."

Q. So how did you deal with challenges along the way?

"The first thing is to listen to people. I always said from the beginning that we are going to make this change, we are going to set ourselves up for success. But I am also very clear that I recognized the fact that not everything is going to be perfect on day one."

"I wanted my team to feel mandated (compelled almost) to speak up if they have any concerns on something that is not working."

That didn't mean the change wasn't going to happen, says Sofia.

"I wanted my team to feel mandated (compelled almost) to speak up if they have any concerns on something that is not working. They should feel comfortable to put their perspective on the table, tell me why it is not working, and elaborate on what they think we need to do to be able to make this work."

"I have always been clear about the fact that we will be making the change but being conscious and clarifying that the way forward isn't to do it in a dictatorial way. The most crucial part for me, was **to create an environment where**

people feel compelled almost, to own the transformation. And then of course, if they have solid arguments for why something isn't working, I ensure that either myself, or other members of my team pay attention to it and ensure that we course-correct wherever needed. Because ultimately, you need to get to a space which is better than where you started from. It is not just about executing the project. The execution is important, but it needs to work holistically too."

“I told my team, we have three ways to deal with this.”

1. It’s crap
2. Do as we are told
3. Co-shape

We can say this change is all crap, but if we say that, then we say we need to draw our conclusions and not be a part of this organization. Because to be honest, I also believe a bit in the hierarchy. If the larger organization has decided to move in a certain direction, then you do expect a certain sense of loyalty, and an acceptance of that reality. Because if you don’t follow any sense of hierarchy, what you have is anarchy.”

“The second option was to say, that the global corporation tell us what to do, we will implement it as it is, no questions asked. Now that is also not an attitude that I would want.”

“I told my team “look, we need to go for the third option which is, **“we see what you want to do, where you want to reach in terms of the end state, but let’s now co-shape this, because we know this region, we know this business.** We are signing up for this, but you don’t have to tell us what to do, let’s make sure that me and my team get a seat on the table as well, and that we co-create the process.

“That approach has been welcomed and has been allowed by our senior management. It has created a lot of goodwill towards myself and my team as well. I was very clear towards my team as well as my senior management about what our options were, and we consciously decided to opt for co-creation.

Q. So in this entire scenario, what would be the role of an external coach?

In working with Merv and his team, Sofia points to three main areas where an external coach can help:

1. Clear on what we stand for
2. Help shape the content
3. Facilitate the process

“Three things that an external coach can do. Crystallizing very clearly, within the leadership team, what we wanted to stand for. Then helping us prepare for that. Helping us work through challenges with our teams from a leadership point of view. They also helped to translate our internal vision to the larger group of leaders across the organization and co-facilitating that. I stressed on co-facilitation very intently. Because I wanted very clearly to ensure that these meetings are owned very strongly by me and my leadership team. The approach that they brought, particularly with the co-facilitation worked perfectly in our case.”

“I think Merv and his team has done an amazing job in helping us prepare and have been critical at facilitating and co-facilitating the face-to-face meetings.”

Q. Considering that Merv is an outsider to your organization. What made you trust his methods and processes?

“It was very much based upon our personal connection. I had one or two meetings with Merv, prior to starting with this process.”

“After a certain time with a coach, you can quickly identify whether there is a connect, whether you feel a sense of chemistry, you get the hunch that your outlook and perspectives match. It was very much based upon our personal connect. I had one or two meetings with Merv, face to face, prior to starting with this process.”

“I got Merv to work with all the members of my team, to whom I had to communicate. He also had to connect with different people of the finance department, even those that did not report directly to me.”

Q. So why was Merv a good fit for your organization?

The personality, candor, and the mentality that Merv brought on board. The pragmatic, positive mindset contributed to that as well.

“I feel that if we had gone with any other person, I might well have come to the conclusion that this will not work, and we would have had to abandon it. In the consulting business, there are a lot of companies. Therefore, for me, it's about the individuals you work with, it's not about whether its company X, Y or Z. It's the individual, he or she, who makes the real difference in that consulting experience.”

“I think it's probably also the personality, candor, and the mentality that Merv brought on board. The pragmatic, positive mindset contributed to that as well. I have that too, and I found that so did Merv, and that helped to a great extent.”

Q. When you look back on your long journey, what would you have done differently?

“I probably could have consulted more people across my organization.”

“I would probably try to spend even more time connecting with people face to face. Train them, explain to them why we must make the change happen. But it is also a question of the prevailing environment. When your business is changing, then you have to be prepared for change.”

“You can never over communicate.”

“So, what would I do differently, probably a lot. But honestly it will be better for me to hear that from other people, “what is it, that they would have liked me to do differently?”

Perhaps one of the things I should have done differently, I probably could have consulted more people across my organization. You can never over communicate”

Q. So what do you look for in a leader?

Authentic leadership has nothing to do with title or politics, believes Sofia.

"I have always believed in authenticity. What people truly want in their workplace is to see authentic leaders, they want to see someone who empowers them. And I think...a good leader is one who can create followership. And you cannot create followership with your title, because that doesn't work anymore. That's why I don't concern myself with politics."

"The end goal is to bring the team, bring the organization to a better place. And that often means that the setup may be very different to what you were doing in the past."

Q. What advice would you give to someone who is attempting to make change happen in a large organization just like yours?

"Be courageous. And make sure that you have a compelling vision. Because people are not interested in change for the sake of change. You need to have a story. And the story needs to be about where do we go to."

"Stand in front of your team and tell them, 'Now it all sucks, and it's ugly. But in three years when we do this, we will be heroes.'"

"I stood in front of my team and told them, 'Now it all sucks, and it's ugly. But in three years when we do this, we will be heroes.'"

"So you need to have the vision, you need to be courageous, and you have to make sure that it is not just your project. You have to ensure that other members also embrace ownership of that vision. Your entire leadership team has to buy into it, and you have to ensure that you co-create it. If it's just coming from one side, it is not going to be sustainable in the organization"

Q. So getting that buy in from everyone is important.

"You have to ensure that every part of your business has a very clear and connected story."

"Absolutely! One important way to make that happen is to build a tribe. I think you need to have a story. You have to ensure that every part of your business has a very clear story. I always ask my managers "where do you see us, three years from now? What is it that we want to leave behind, when we look back at our business three years from now?" Not just from the business point of view, but also from the talent point of view. That is what keeps me going."

Q. So In a sense, you are always pushing the goalpost forward as much as possible.

"I think you have to. You cannot do something without clarifying your vision first. You need to analyze critically first, talk to people, and then decide where you wish to go. It has to be very aspirational, but you also have to ensure that there is a sense of realism. Because once you have that, then it's all about execution."

Q. What has your experience of coaches been like?

Sofia points to her experience with large consulting firms, noting that after the consultants have left, she still has to face and work with the people affected by any changes.

“The experience with Merv has been excellent. He stayed with us and empowered us to be in-charge.”

“My experiences with business coaches in general, with regards to making big change in large organizations, hasn’t been good (except with Merv of course). I would say that I have always been reluctant to implement what they suggested. Because in a sense it is me who will be left holding the can and dealing with the consequences of all the decision making. There is a difference between challenging someone, having conceptual discussions with someone and actually making the change happen on the ground.”

“My experience with Merv has been excellent. With Merv, I realized that things ended up being almost tailor-made, because of the way we were. But with others for—especially with these big consulting houses—hasn’t been that great. The ‘Big Firms’ paint a picture of doom and gloom and give you the impression that they are the ones with the solution, and

they make you dependent on them.”

“That was not our experience with Merv at all. That’s why I keep saying that it is ultimately about the individual who is helping you drive change as a coach.”

“I think there is a big responsibility on both sides. When it comes to bringing about big change in an organization, I am quite reluctant to have an external agency drive that change. I truly believe that the change has to come from within and assisted from outside, otherwise it is not sustainable.”

Q. So in your opinion, what should the role of an external coach be in this setup to make this sustainable?

“What the external coach does, is to provide you an external sounding board— a mirror if you like—and at given points just get all your ideas together.”

“An external (coach) can really help in providing the outside perspective especially if you have spent a really long time in a company. For me the external help is far less needed in the aspects of project planning, internal assessments and so on. But what the external coach does, is to provide you an external sounding board— a mirror if you like—and at given points just get all your ideas together. It is something that can be very helpful.”

“Certainly from my perspective, I can absolutely see a big change process where a lot of the support come in from a third party, coaching comes from a third party, but the actual transformation process is handled internally, because that is the only way for this to be truly sustainable.”

Q. This has been a particularly enriching conversation! Thank you for sharing your experiences with us. ... You are most welcome!

Coaching and Facilitation Services

Our application of coaching goes beyond the traditional one to one setting. The Coaching philosophy is baked into all facets of the workshops, facilitations, all company meetings, working offsites and interventions we design and deliver.

Our sessions are not designed around manufactured trust exercises. Although there may be some value to those -- we set out to create a shift in thinking - a shift in behaving. These shifts happen when an “experience” is designed to allow each person an opportunity to gain a more profound understanding of each other and provide a forum for the leader to authentically declare the expectations of the business. We facilitate not just a path to your desired outcome, but a sustainable path for results.

Facilitation with a coaching style is the difference between simply “training” and a lasting “experience”.

A Facilitator, in its pure sense, is someone who helps a group understand their common objectives. The Facilitator then assists in the achievement of those goals from a neutral standpoint. The result is a strong basis for future action derived by consensus from all team members. A Facilitator with a coaching style does that PLUS drives the impact even deeper by encouraging dialogue on issues that most likely have never been openly shared. We create opportunities to identify barriers and build effective action plans.

Every program we deliver is unique. Whether we are delivering a program multiple times across an organization, or for the first time in a new organization, our goals are the same - to facilitate the desired outcome of the leaders. The method by which we facilitate varies as we flex and adapt to the various mindsets and paradigms of each group.

Our goal, through discussions and planning calls ahead of our program delivery, is to design a series of learning experiences that will:

- influence the adoption or enhancement of mindset/behaviours that align to the program objective;
- identify the key barriers that stand in the way of change across the organization;
- educate leaders on the nature of the change, the impact of the transition, and their role in it;
- involve leaders in developing techniques that help the people through their transitions and growth;
- create a sense of personal ownership and accountability; and
- provide mechanisms to cascade the messages across the organization.

Our tactics could include:

- Working Offsites - establishes the leadership mindset needed throughout the organization to support the change.
- Leadership Summits - transitions people through organizational change and identifies how they can contribute.
- All Company Meetings – provides an experience that engages the entire company into an aligned direction and provides a foundation to influence and shape the organizational culture.
- “Working Together to Win” Workshops – creates high performing teams through the identification and understanding of business challenges, the strengths of the talent that exists, and how to apply the current talents and strengths to the business challenges.
- Coaching Clinics - heightens the Manager’s ability to have purposeful conversations and provide feedback that develops others and deals with critical performance corrections.

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