

# Bluteau DeVenney & Company

HELPING SUCCESS COME NATURALLY

## Team Performance Indicator

### Case Studies

**CEO of a Health Care Organization**

**CEO of Financial Services Organization**

**CEO of Fast Growing Manufacturing Firm**





## Scenario One:

“Despite strong individual performers and regular – and pleasant – meetings, my team does not work together. After our weekly meetings, everyone goes their own way and never interacts with each other from there. I have five silos! The duplication of energy and effort is enormous and I am constantly working “back door” meetings to get people on the same page. Worse yet, the behaviors are following down to the next levels – each department avoids the others and no one crosses the lines. We are wasting money and resources and not meeting targets!”

CEO of Healthcare Organization

## Shifts Happen:

Without collaboration, organizations can not hope to leverage people and resources to execute at a competitive leverage. Working in silos limits potential and creates roadblocks to success. The senior team models the way – if leaders at the executive level are not seen working together no one else will.

Our client headed a large healthcare organization plagued with lack of management interaction.

As CEO, she spent much valuable time meeting individually with each senior team meeting to try and connect ideas and initiatives to get people on the same page. Despite the investment of time and energy, departments were not working to the same priorities. The impact on the CEO was a sliding in her own performance – with so much time spent on negotiating between the executives she was not able to focus on her own strategic work and the organization was moving at a slow pace missing targets and deadlines. The cultural environment was not empowering – it was almost combative at times across functions seemingly fighting for resources. The Board was putting pressure on the CEO to make changes – or they would make a change at the top.

Using our Team Performance Indicator, the CEO was able to clearly understand the underlying causes of the dysfunction at the senior team level.

Predictive performance analysis highlighted the differences in approach among the senior team and explained why members did not relate well to each other. The analysis revealed the underlying sources of stress between the teams that drifted down to their own reports. With clarity of why people did things the way they did, the CEO was able to bridge relationships and help team members appreciate the value of different approaches and not take it personally.

The CEO used the Team Performance Indicator report to facilitate a participative strategic offsite to define shared priorities and get to the bottom of what was most important to people. Working together, the team focused first on the client and collectively identified the core performance drivers to meet market demands. Open discussion about challenges and opportunities ended with a focused energy and engagement to work across functions to meet performance expectations.

The Team Performance Indicator also supported senior team members to understand the leadership needs and approach to foster better teamwork and communicate the need for changing behaviors at all departmental levels. The executives started by modeling the way to work together. Focus was put on examples of inter-departmental teamwork.

A positive shift happened at both the senior team level and throughout the organization. A greater level of strategic teamwork happened, the CEO enjoyed better use of her time, and deadlines and targets were met.

Shifts happen ...



## Scenario Two:

“Keep your head down, keep it to yourself, and don’t get involved. How can we succeed with that type of culture? We are struggling to survive right now and people are not getting the need to change. I am constantly spreading the message and the pressures for us to do things differently but people are not getting it. These are smart people but they keep doing the same things the same way. It is just maddening!”

CEO of Financial Services Organization

## Shifts Happen:

Leading change is one of the top challenges for leaders. Studies consistently show that organizations that are flexible and able to change quickly have a competitive advantage to the market. Our world is more and more complex and uncertain and organizations need to be able to adapt to market movements to survive and thrive.

Our client led a national financial services organization that had always done things a certain way and such behavior had been rewarded to such a point that no one would change despite tremendous market pressures that could bankrupt the business.

As President, our client was saddled with a senior team that did not talk out of turn and was seemed complacent to the need for change. No one had a sense of urgency. Departments were very different in culture and there was disconnects to the point of animosity. The former leader had ruled with an iron fist and people looked down as much as possible and protected their turf vigorously to avoid losing resources. Although people nodded in agreement with the need for change, no one made a move. The President had even shared the disastrous financial indicators and the losses were clear. What could make people smell the coffee and make a move?

Using our Team Performance Indicator, the President was able to put a tangible picture to why different team members reacted different ways and why the message was not working with them. The analytical reports included in the Team Performance Indicator provide an explanation of how people solve problems, make decisions, and communicate effectively. Quickly, the President grasped that his way was not necessarily their way. With simple and clear data on how to best connect with the senior team members, the President was able to adjust messaging to the audience – people started to get it.

From the Team Performance Indicator report, the President also gained clarity as to what the team needed from him in terms of leadership. He had not looked at it this way before – the message was right there and he didn’t understand why people didn’t get it. Being very logical in approach, the President was not connecting to the team who were very promotional in approach.

Our client organized his communications based on the Team Performance Indicator and was able to focus the team on the benefits of his change initiatives. The President and the senior team also used our analysis to understand how to lead change and bridge the divides between departments.

An assessment component of the analysis identifies the culture of an organization or department and how best to lead change given their specific dimensions. It worked – structuring the approach to change to match the culture made a significant improvement in engagement and support.

A further component of the Team Performance Indicator report gave great clarity to the differences in priority for the senior team members. They did not match the priorities of the President. Again, with the understanding provided by our analysis, the President was able to participatively agree on the agenda for change and priorities for focus with the team.

The senior team and their departments started to understand and buy-in to the need for change and focused on the core key performance drivers. The need had not change, but the analysis provided a change in messaging that made tremendous shifts in engagement.

Shift happens ...



## Scenario Three:

“We seem to be mired in the muck! Our team has a lot of energy and we see the vision and the opportunity but we seem to get off track when it comes to executing the plan. Everyone knows what needs to happen and we have plenty of initiatives but we are always behind, racing to make things happen, and apologizing to clients a lot for the misses. I don’t know how we can grow because we can’t manage what we have now. I would like to know people are on the same page focused on what is most important – but I’m not sure at all about that! We need to do better or we will miss the boat.”

CEO of Fast Growing Manufacturing Firm

## Shifts Happen:

Senior teams are the greatest supports and, at the same time, one of the greatest challenges for leaders. Executives are the levers that translate vision and strategy to actions and results. Leaders need senior teams that work from the same page and delegate the message to build focused engagement to realize the desired results. More than 80% of senior teams do not work this way – a primary reason why businesses lose 37% of potential revenues and profits each year.

Our client was the CEO of an innovative manufacturing firm that had grown dramatically both in terms of sales and workforce. However, top-line sales had not resulted in bottom-line profits. The team discussed and debated strategy openly and, yet, once outside meetings worked on different initiatives. Tactics did not match strategy.

As CEO, our client was exhausted and frustrated by the need to watch the numbers and the timelines. Without prodding, many executives would not deliver on time. Ideas flowed and opportunities were overwhelming but the team could not seem to get their acts together. Errors had started to add up and the workforce was becoming frustrated due to lack of direction and focus. Senior team members started to place blame on others as missed targets and mistakes mounted to the wrath of the CEO.

The Board was not happy. The CEO needed to do something different and soon to get the team on track.

Using our Team Performance Indicator, the CEO was able to understand the performance strengths – and areas of challenge – of his senior team. The findings were revealing – his team were clones of each other! Almost everyone shared the same work approach so there was not enough synergy and many needed strengths were missing. His team could build vision and strategy but had troubles connecting the tactics. Easily distracted, the team focused on new opportunities constantly and changed directions constantly to the frustration of their own teams.

Focus and alignment were not present at the senior team level and the rest of the company was suffering. Despite a culture of innovative energy results were not being seen and people were losing faith in the leadership.

The CEO used the predictive assessments of the Team Performance Indicator to make shifts in his senior team and make sure the needed strengths were added. The leadership analysis of the report helped his team members understand what the workforce needed from them and the supports they needed to work at their best.

By understanding the make-up of his team, the CEO was able to provide the right leadership to support focus. Adding team members with strengths in tactical planning, timelines were more reasonable, initiatives were coordinated, and timely progress reports kept products moving according to schedule.

The Board was happy.

Shift happens ...



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