

## DAN: A Case Study in on Cultural Evolution and the Intangible Impacts

### DAN'S COMMENTARY:



The first time I met Harold, I was the New England Senior Vice President for a regional brokerage firm. While seeking new approaches to supervision I enrolled in one of Harvard's evening graduate courses called "Leading Change in Organizations" and met Professor Langlois. The first consequential events had nothing to do with my organization. Rather, this started a metamorphosis within me. Harold has a fearless commitment to bringing about self-examination which leaves no room for deflection or rationalization. The premise is that if one is unwilling or unable to be honest with one's self, then attempting to lead change initiatives with others, never mind an entire organization, is next to impossible. He also managed to build the trust of the class as he confronted each individual in an equally tough way. With each breakthrough he continued to lead forward with constructive support and reinforcement. At the end of the semester the general feeling was "WOW, what am I experiencing?" For me, the only option was to enroll in his second course, "Managing Conflict in Teams" and again, "WOW." Tough, hard hitting, and transformational in an experiential and lasting way; our journey was underway.

Harold agreed to consult for me and my organization, a company with a market value of about 180 million at the time. As a change consultant working with senior and mid-level management tiers, he identified the key to unlock results, primarily by addressing the neurobiological triggers and blocks, creating opportunities for individual development and change, all within the workplace environment. He was an early adopter of behavioral finance techniques and went on to develop a cutting-edge Institute that engaged over three hundred financial advisors each year, as well as other creative initiatives for the company leaders, raising everyone's productivity while also being a major force in cultural evolution. Over the next several years the company evolved and developed in amazing ways. Advisor productivity doubled, teams were developed, and tremendous value created. Measurement included bottom line as well as intangible impacts. The business grew and eventually was acquired first for 300 million and a second time for 400 million plus...value creation in a very competitive dynamic environment. This value creation would not have happened without Harold's leadership, guidance, and tenacious focus on confronting challenges head-on without the typical buzz - wordy, groupthink, fluffy corporate cultural initiatives all too common in today's organizations.

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