

## LAURA: A Case Study in Altering the Cultural Fabric of a Well-Established Firm in the Financial Sector



### LAURA'S COMMENTARY:

When I first began working with Harold and Kate I had several concerns running through my mind. The most compelling revolved around my existing four Regional Directors not accepting new ideas about how to increase support for their teams. Prior to my promotion as Director of National Sales, I had worked with the Regional Directors as their interface with the home office. During that period we were all at the same organizational level, and I spent most of my time putting out fires.

Within the first few meetings with Harold I expressed my overwhelming frustration with the Regional Directors' well-established behaviors. Every day I was presented with repetitive problems, and I began to feel like the proverbial gerbil running on the circular wheel while going nowhere. It didn't take me long to realize that we needed to make significant behavioral changes if we were to move beyond the inertia that plagued our operating assumptions. Harold defined the challenge as a journey without a specific destination, and we could expect a great deal of emotional turbulence in the form of aggressive resistance as we altered the playing field of what defines the skills needed to carry out new responsibilities. Historically, the Regionals' orientation toward providing training and supervision for their wholesalers had relied upon prescriptive advice, and their messaging took the form of "Here is what you did wrong and this is how to handle that objection in the future."

It didn't take me long to realize that any significant change had to emanate from the Regionals' own recognition that they were not effectively supporting their respective sales forces. Rather, in a very perfunctory way, they were limiting their sales team's abilities by telling them what to do. This approach was based on a top-down military model that suppressed learning and favored following orders. By confronting the Regionals' shortcomings I needed to become more critical of my own behavior. I know that my desire to be liked stemmed from my own habits of needing to be in control, and if all I did every day revolved around solving their repetitive problems, then we were never going to address the behaviors that were inhibiting growing our business.

I believe that the scenario that I have described is very common in today's rapidly changing environments. With Harold's and Kate's guidance my team and I were able to develop new patterns and acquire skills that have made us more effective, reflective, and helpful to one another.

If you find yourself in this kind of organizational dilemma and you have employees/direct reports who need to awaken their ability to change their tedious, robotic actions and rediscover their capabilities, then CMS can be a great partner.