

Illustrative HDA Talent, Leadership Development and Organisational Change Case Studies **hda**

HDA Case study 1 (Employee Engagement and Key Skills Retention in a High-Speed Environment - Technology)

Background

A rapidly changing technology company had delayed its commercial launch in the UK given software development delays. The business's investors were keen to keep the organisation fully engaged, within a highly constrained budget:

- Developing its world-first technology at high speed for an accelerated launch within the next four months,
- Retaining key technology skills and expertise within the business,
- Developing global partnerships,
- Ensuring that its intellectual property was protected,
- Ensuring that key quality processes were introduced,
- Ensuring that a new CEO was hired within the next 3 months
- Ensuring that cash spend was maintained at X, despite high levels of commercial activity

Given these objectives, the company demanded a lot from its people, (eg. the London office was often almost fully staffed two or three hours after the close of "normal business hours" for at least the first year after funding, as a "normal" day's work could not fit into a typical 8-hour day. It was also the norm to "find" Palo Alto colleagues online, completing their previous day's work at 10 or 11 a.m. each morning).

The company also had very little to offer people as a lean venture capital funded company, other than a future stake in the company (via stock options), and via actively seeking opportunities to leverage careers by encouraging people to get involved in areas of the business that they would not typically get involved in within more established businesses (Notwithstanding the fact that, for the most part, people in new or newly restructured organisations are often required to spend much of their time working well within their capabilities, ensuring that the basics are done within the constraints of the situation, without the typical levels of support available within established companies).

HDA Intervention

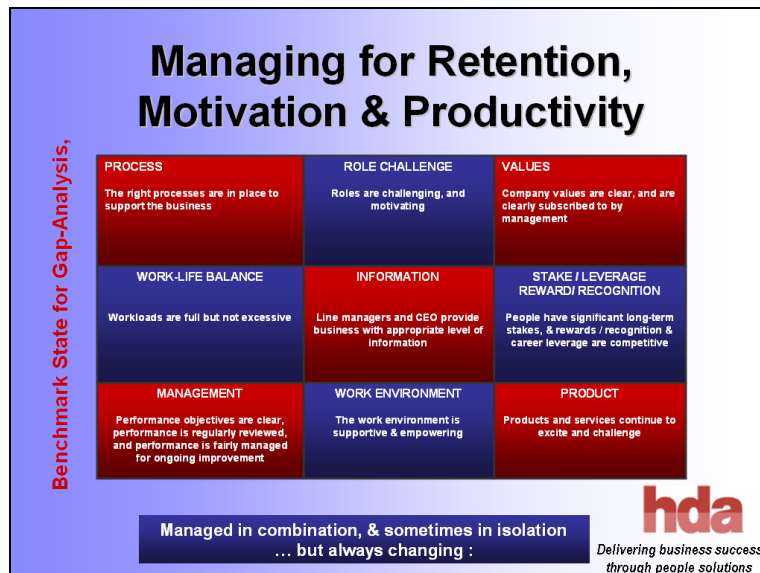
An internal, holistic survey was conducted on all staff across the organisation, both in the UK and the USA. The survey measured the following predictors of team satisfaction:

- Process – are the right processes in place to support the business?
- Role Challenge – are roles challenging and motivating?
- Values – are company values clear, and are they clearly subscribed to by management?
- Work-life balance – are workloads full but not excessive?
- Information – do senior managers provide the business with an appropriate level of information?
- Stake/Leverage/Reward/Recognition – do people have significant long-term stakes in the business, and are rewards, recognition and career leverage opportunities with the organisation competitive?
- Management – are performance objectives clear, and is performance regularly reviewed and fairly managed for ongoing personal improvement?
- Work Environment – is the work environment supportive and empowering?
- Product - do solutions, products and services continue to excite and challenge?



Detailed and headline feedback results were then systematically used over the next six months as a key driver for:

- Facilitated objective-setting
- Management meeting actions
- Management interventions
- Process adjustments
- Company meeting agendas



Results

The process was repeated after 6 months, and again six months later, with focus on continuous improvement in all measures, and the facilitation of change where operational and managerial weaknesses were identified. As expected, improvements in certain measures, impacted negatively on others.

During the 18 month period the company successfully launched its technology in the UK and in Germany, and licenced its technology in Japan, whilst extending its cash reserves for four months longer than budgeted. During the period, the company experienced only one resignation (in the US), and was considered to be very stable, despite its various financial constraints, the marketability of the talent within the organisation, and significant differences of opinion across the organisation about future directions of the business.

The management team agreed that managing within a clearly defined framework for measuring the team's temperature, and for informing management team actions, (followed by concrete - and clearly communicated - responses to areas of weakness) was a useful approach to setting the agenda for managing the key people component of the business within a highly constrained environment; specifically:

- key skills retention,
- intellectual property protection, and
- optimization of employment costs
- development of quality culture



HDA Case Study 2 (Creating a Coaching Culture to Enhance Organisational Performance - Property Development)

Background

A housing corporation, with a substantial build programme and strong community links, needed development of the leadership and management staff in the organisation.

The development work was designed against a context of changes both internally, and in the external marketplace, including:

- The arrival of a new Chief Executive with a remit to make radical changes to the performance of the organisation
- A significant change to the provision of central funding.
- Changes in systems of Government funding, forcing the pace of change required internally to maintain current service levels and standards

HDA's intervention was intended to drive and support the introduction of new ways of working, specifically:

- To move from a perceived “parental”/instructional style of management, to one based on an “adult-adult”/coaching approach
- To equip leaders and managers with the skills to mobilise and work in groups to deliver specific business projects
- To introduce a coaching culture by equipping managers to coach as a way of being, rather than a way of doing

The programme was ultimately aimed at driving and supporting accountability at the point of action, thereby reducing dependence on managers and leaders at every level so that they could focus on longer term planning.

HDA Intervention

Initial discussions with the client led to the design of a programme with two distinct target populations: primarily developing top level leaders in the organisation, and following up separately with the middle managers. Each population received three modules of targeted off-line developmental input involving skills development using practical work and focused on real, live business issues. Learning and practicing coaching skills was the focus of module 3 for both target populations.

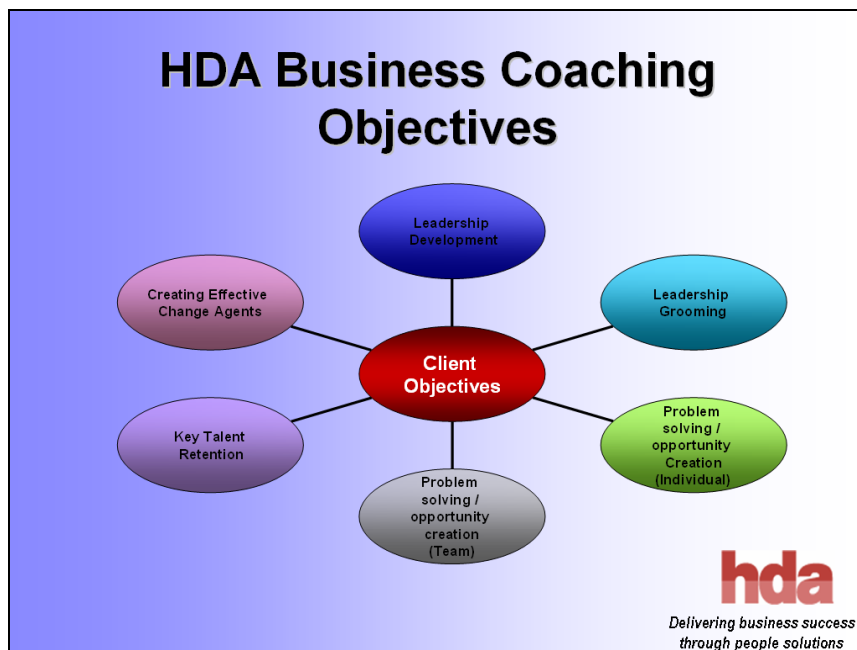
All individuals at the highest level were assigned to an external executive coach for 6 months following the completion of their programme for a series of coaching sessions on pre-defined business issues. With continued external support, top level managers then became the coaches for the middle managers across the organisation, coaching cross-functionally across the business to continue the drive to raise business awareness, break down functional silos and maintain the focus on process, as opposed to task.



Results

Initial feedback and observations suggest that there have been some significant changes since the start of the initiative:

- Relationships at all levels have been improved, leading to quicker resolution of differences, speedier decision-making and implementation of decisions
- Individual contribution in meetings has either increased or improved in terms of appropriateness and approach
- Accountability, focus on and delivery of results is now expected by senior managers and become part of the language of the organisation. Delegation has been increased successfully
- A number of key business priorities have been positively progressed
- The loss of 2 key personnel has been planned for and managed with minimal disruption to the business
- A process to cascade coaching throughout the organisation is now underway
- Initial feedback from employees is that they have noticed a positive change in the leaders and managers across the organisation





HDA Case Study 3 (Managerial Group Facilitation to Drive a Key Restructuring Project - International Manufacturer)

Background

The organisation had made a strategic decision (linked to key savings and customer service rationalisation objectives) to restructure an entire division, comprising four subsidiary companies based at three sales/distribution/technical service facilities, and one manufacturing facility. Operational plans were in place to physically relocate two sites to a third existing site, while the fourth site would be restructured as a lean manufacturing “best in class” operation focused exclusively on the UK market, with a proportion of its capacity shifted offshore. The organisation was given 9 months in which to effect the restructuring, with focus on the following objectives:

- Achieve an agreed IRR for the project
- Achieve target net operational savings pa, in addition to headcount savings
- Do not lose existing business as a consequence of consolidation
- Minimise losses of key managers and employees
- Achieve operational synergies
- Restructure asap, subject to budget approval and planning permission
- Ensure facilities and office/laboratory design support a seamless process, and provide additional consideration for potential acquisitions
- Communicate openly and inclusively
- Outsource where sensible

The restructuring had implications at all levels across the organisation, including:

- Significant functional and role changes, including significant product / customer / technical service training needs
- Likelihood of future role redundancies as new roles were developed and existing ones consolidated, (in the context of retaining all key staff in the immediate future)
- Relocation of the majority of staff, (including senior managers)
- Facility changes in respect of staff not expected to move
- Cultural changes, given that teams from very different organisations (including recent acquisitions) would be expected to come together, and work in new ways

HDA Intervention

HDA brought together the entire divisional management team (40 directors, managers, team leaders and project leaders), in a powerful group coaching process to engage “hearts and minds” around the task a hand, and to generate areas of agreement and disagreement around how key objectives of the project would be achieved.

(Bearing in mind that a significant proportion of the team had personal misgivings about the restructuring, both from business and personal perspectives).

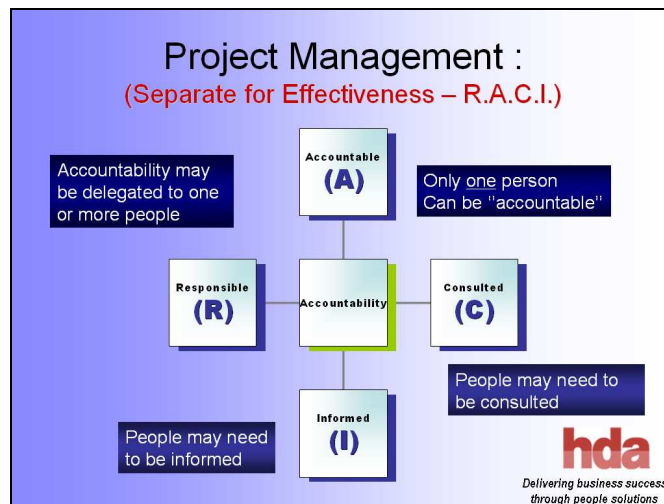


The Executive Committee initially had misgivings about bringing together a large group, given a good deal of concern about potential for dysfunctional disagreement on “sticker” issues. HDA assured the Executive Committee that bringing the team together would be a powerful method of engaging and motivating the entire team from the outset.

The process comprised group facilitation, individual group break-outs, and feedback to the group and executive team, moving quickly from an analysis of concerns, constraints and risks, to a broad project planning structure which took into account both individual and organisational interests – with focus on key agreed objectives.

Focus was placed on “how” the team would arrive at project structures and objectives, and on “what” the team would then put into action, to ensure team buy in for the process, despite any personal misgivings about the organisation’s strategy.

HDA introduced the team to the R.A.C.I. approach to managing organisational restructuring projects, and concluded the process with identifying eight key project streams, (eg. internal communication, HR, facilities, etc) together with project owners and cross functional support teams.



HDA then worked closely with selected teams and with the Executive Committee to move people-related project plans along, including playing devil’s advocate on a number of key issues related to the business’s culture, eg. the business had a history of incentivising people with financial incentives in the first instance, vs focusing on role management/growth, career development, internal communication, etc as a strategy for ensuring key skills retention and team motivation.

Results

Participants reported:

- Being very satisfied with the HDA-facilitated process during which key issues for the organisation were agreed in an open and non-threatening environment, and during which clear project plan frameworks were quickly arrived at by the team



- Trusting the organisation, despite continued misgivings in cases about “what’s in it for me in the future?” once the business is consolidated
- Having a clear view of expectations for themselves and their teams
- Having appreciated the opportunity to come together as a team to agree issues and actions with senior colleagues whom many had never met before, but with whom they would need to work more closely in the future

The organisation is currently on track to conclude its restructuring process within budget, and project plans are largely on track. The management team is currently progressing all project streams, and HDA is regularly updated on progress.

Organisational communication objectives to date have been met, and support elements are in place to ensure that customer needs are met during the restructuring/consolidation period, while key skills are maintained intact prior to the final consolidation process. HDA is supporting the organisation with specific individual needs.



HDA Case Study 4 (Portable Skills Re-deployment - Investment Bank)

Background

HDA had provided outplacement and re-deployment consultancy to a large international investment bank for a number of years.

Following a decision by the bank to outsource elements of its IT infrastructure to Asia, it approached HDA with a view to establishing how HDA could provide specific support to a regionally-based IT team comprising approximately 125 team members at all levels, whose skills and knowledge were very likely not to be easily transferable elsewhere within the bank, despite the bank's solid internal re-deployment record, (typically 80 % successful internal re-deployment of at-risk employees).

Context which HDA took into account:

- There was no guarantee of successful internal re-deployment, despite a solid record,
- The IT team in question had long service on average, with low turnover & a low level of current transferable skills,
- Opportunities for alternative external employment were low as HDA's client was the principal employer in the area,
- General internal re-deployment workshops for people at risk were already in place, but were viewed as insufficient for the IT team's needs,
- Site culture had changed somewhat - from the original "friendly" culture, to one that had become somewhat "tougher", and increasingly performance-focused,
- Morale had recently been low in the IT team,
- Current policy was that the best candidates win open roles; (no preference was given to at-risk employees - the bank prides itself on being a meritocracy).
- The bank provided a sophisticated online career management facility, however, staff either did not know that it was available, or they appeared disinclined to use it.

HDA Intervention

It was agreed that the project should be focused on encouraging career mobility, skills portability & skills/strategies for ensuring successful redeployment, or potentially (with some subtlety) for leveraging external opportunities. These, broad themes were effectively communicated during both the marketing process and during the event.

Specific objectives included:

- participants to recognise that a positive culture change had taken place around the need within the bank for career self-management,



- participants to focus on identifying their specific strengths/weaknesses with a view to actively improving their marketability and building a "portfolio" career,
- participants to "open up" & feel comfortable about actively considering both internal & external career opportunities,
- participants to take ownership of their personal development plans, and to hold themselves accountable for their growth & marketability inventory,
- participants to improve their networking skills, for internal (& by extension, external) success,
- participants to be provided with guidance to write effective CV's & cover letters (short/sharp/to-the-point),

A comprehensive three day interactive onsite event was managed by HDA, including the following elements, and including a number of HDA facilitators, coaches and presenters:

Day 01 - Analysing your skills and future direction

Day 02 - Marketing yourself

Day 03 – Effective networking

IT team members attended the event on a staggered basis over the three days to ensure that departmental operations were not disrupted during the event.

Results

- **Analysing your skills and future direction** - 81% of participants stated that they would take direct action of some sort as a result of this session.
- **Marketing yourself** - 85% of participants stated they would take direct action of some sort as a result of this session.
- **Effective networking** - 90% of participants stated they would take direct action of some sort as a result of this session.

HDA's client reported that the event had been viewed as a success, and of significant assistance to the IT team as:

- The team was provided a clear view of what was required by them to progress their careers, in the context of their roles being very likely to be outsourced in the next 18-24 months,
- The team had largely been lethargic about leveraging internal career development facilities and seriously pursuing internal opportunities, leading to a poor record of success with internal applications. The HDA event had provided them with valuable strategies for actively managing their careers, "managing their managers" for their career advantage, (eg. by being actively staffed on key learning projects), leveraging HR and L&D, improved internal and external networking, etc.,
- The team generally felt very pleased that the company had taken such an open approach to frankly discussing their career aspirations, and opportunities for developing themselves, both within and potentially outside of the organisation,



- The team had largely replaced a sense of growing distrust and alarm about their futures, with a realistic view of how they would “own” their personal career plans.
- The event had created a renewed awareness around career leverage facilities and tools managed by HR and L&D.

Since the event, HDA has worked closely with a number of the individuals who participated in this event; helping them to successfully move into new roles within the bank, to move into new roles elsewhere, and/or to enter self-employment.

HDA Case Study 5 (Business Partnership Culture Implementation - Public Service: Central Government)

Background

Recognising the importance of business partnering (BP), the HR Director of a UK Central Government Department; decided to set up an interactive process of sharing information across the whole of HR, including setting up a working group to sponsor its introduction.

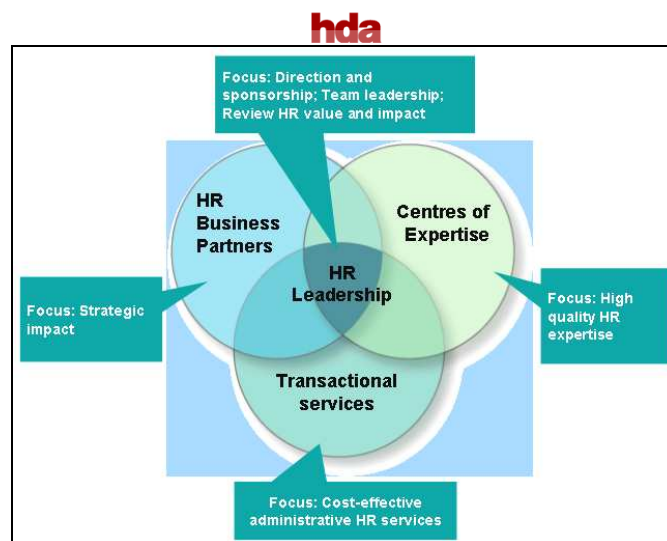
This initiative was launched as a key response to the planned implementation of an HR shared service structure within the organisation, and a recognition that the combined HR and L&D team suffered a degree of “unempowerment”, and a lower than acceptable image within the organisation.

Objectives:

1. To disseminate information about business partnering across HR.
2. To identify a new skill set for HR personnel wishing to become business partners.
3. To establish a BP working group to sponsor the introduction of business partnering.
4. To design a Business Partner Development Guide to enable the HR team to become more strategic in focus; acting as solution providers and guardians of best practice, and creators of new learning solutions.

Key Activities undertaken by HDA

- HDA conducted background research into best practice in business partnering, including exploring the David Ulrich model which has gained traction within the Public Service.



(Ulrich Model)



- HDA designed the content of briefings, and shared this content with the Senior Management Team.
- Briefings were delivered by HDA for all HR team members in a relatively large team based in multiple locations, with the opportunity created for everyone in the team to gain an understanding of the BP process and to put questions to the HR Director in an open forum.
- Volunteers were invited from the briefings to form a Business Partner Working Group.
- HDA facilitated regular meetings of the BP Working Group and conducted background research into how other Departments and other private sector businesses were addressing business partnering.
- Recommendations were made on how to introduce business partnering, including the dissemination of the Professional Skills for Government and the HR Professional Standards.
- Together with the BP Working Group, HDA prepared presentations and recommendations to the Senior Management Team and Team Leaders on proposed organisational structure, business partner role specification and next stage actions.
- HDA scripted and designed a Business Partner Development Guide based on the HR Professional Standards and customised for the role of a Business Partner.
- This included how to develop and demonstrate competence, as well as a detailed list of additional resources.
- HDA made recommendations to the client for next stage actions.

Outcomes

At a time of concern about changes within the Department as a result of the proposed introduction of shared services, introducing the Business Partner briefings gave everyone within HR the opportunity to clearly understand what was meant by business partnering. In addition through the use of the Ulrich model there was also the opportunity to demonstrate how everyone had a positive role to play in the process. Finally by gaining access to the HR Director in small intimate groups people were given the opportunity to ask more general questions about the future.

Another positive by-product was the setting up of the BP Working Group, this group was in no way pre-selected, and the invitation was made to everyone within HR irrespective of grade, or role. The resultant group of volunteers took their role very seriously and made high-level recommendations on both the organisational structure and the role specification. They also gained valuable experience through networking with other Departments and making presentations to the senior teams.

The BP Development Guide will now also be used as a template for the design of other development guides as the other key roles are defined. The Department is now in the process of organising cross-department briefings to create a joined up picture of HR in advance of introducing the Business Partner process.



HDA Case Study 6 (Board/Executive-level Capability/Talent Analysis – SME (early stage Diamond Mining Industry plc))

Background

HDA was commissioned by the client's Non-Executive Directors to review its existing leadership and operational structure, given the current stage of the business, and a high degree of senior disagreement about the future strategy and structure of the organisation.

The business had been in operation for 5 years, (listed on AIM) and was about to generate its first mining revenues. Its HQ is based in the UK, with activities carried out in southern Africa (recently commissioned operational mine), Finland (prospecting), Canada (prospecting) and Australia (prospecting). The leadership team and Board comprises individuals of global renown in the mining/diamond trading industries. Despite the leadership team having significance presence in the mining industry and significant commercial experience, the organisation exhibited many of the characteristics of an early stage business which has outgrown the structure of its original leadership team, with a high degree of leadership "churn" and a destructive political environment in evidence.

The scope and activities of the organisation had changed considerably from the time when it was initially set up; from a one-location exploration business to an exploration, construction and soon to be production and marketing company in Europe, Africa, Finland, Canada and Australia. Many, but not all, of the problems the business was experiencing were symptoms of a reliance on the skills, practices and infrastructure of the past.

The Non-Executive Directors were very concerned about significant Board-level rifts, and the threat of key leadership resignations; which - given the stage of the business - could be potentially fatal to the organisation.

Objectives

The brief required that HDA address the following areas key to the business:

- Role & Structure : Board and executive roles
- Remuneration & Fees of key roles (a source of considerable political "churn")
- Contractual Obligations : control over contractual obligations of the group
- Office locations (primarily a resourcing/structural issue)

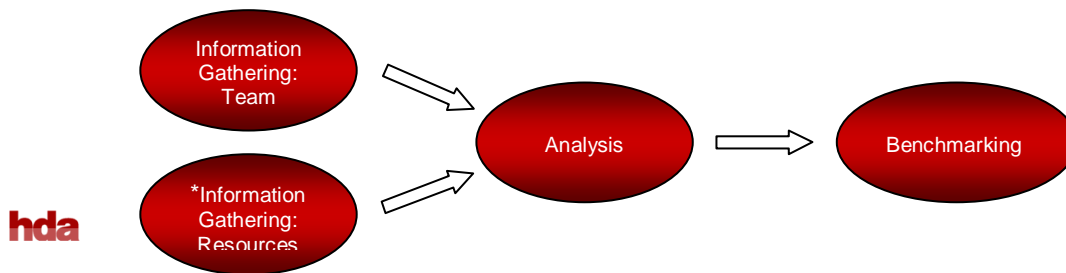
The brief provided HDA access to all Board members, outsourced resources, employees, and required documents. HDA was instructed to provide recommendations in the first instance, to the Non-Executive Directors.

Key Activities Undertaken by HDA

HDA set out to identify a) immediate leadership opportunities and areas of general agreement, b) immediate areas of disagreement and Board impasse, c) expected due-diligence matters (linked to future growth, future funding, future contracts, and future key skills hiring), and d) potential corporate governance and Board integrity exposures.



HDA's consultancy process was conducted in four parts



1. **Structured Interviews:** using a structured questionnaire, interviews were conducted with all stakeholders, including the Board, executive-level managers, and key employees based in the UK, southern Africa, Australia and Canada. Our experience was that, without exception, interviewees were well informed about the process and willing to provide frank opinions when responding to the specific questions covered in the interviews.
2. **Key information:** key information about the business, including key documents and internal communication, was requested, and obtained where it was available. Where documentation was missing – eg. Business Plan, Business Models, Scenario/Contingency Plans, and Board Minutes – this was also taken into account. Where information was not available, this was seen as adding weight to the due diligence and corporate governance recommendations made by HDA.
3. **Analysis.** Stakeholder interviews were analysed in conjunction with information provided or missing.
4. **Benchmarking:** Results were benchmarked against known best practice. This includes reference to expert guidance from organisations such as the Institute of Directors (IOD), appropriate remuneration surveys, and head hunting firms experienced in Board and senior executive placements and packages.

Outcomes

Following the above process, HDA's recommendations included the following:

1. That a formal Business Plan be agreed and written to ensure that there was clarity around the business's strategy and operational support plans. (That a comprehensive Business Plan had never been previously written was a source of some dismay to HDA given that the business had already successfully obtained a number of rounds of funding, and had listed on AIM).
2. That the client make bold changes to both its Board and operational management structures to ensure the future success of the business.



- a. It was very obvious to HDA as independent observers that the roles of CEO and Chairman in particular needed clearer definition - and decisive decisions needed to be made about the existing incumbents and their likely impact on the success or failure of the business as it entered its first period of revenue generation. HDA provided three scenario proposals for the CEO role including: i) the introduction of an interim CEO role over the following 6 months, ii) the development of the current CEO via an intensive coaching programme, and iii) the structured replacement of the current CEO and the hiring of a new CEO.
- b. It was obvious to HDA that the role of the Board (including non-executive directors) was somewhat compromised from a governance perspective, and needed a number of changes to be made.
- c. It was obvious to HDA that the existing organisation structure below Board-level was very much a work-in-progress, which had reached a point where it was debilitating to the business, it needed to be changed immediately - to i) remove confusing accountabilities and role disconnects, ii) to reduce the impact of these on existing relationships, and iii) to remove governance and due-diligence gaps.

3. That the organisation make key remuneration and office location decisions based on the organisation's best interests, in the context of our structural recommendations, vs making these decisions based on poor

"politically" motivated judgement, (eg. HQ location relative to the City, vs location relative to the CEO's home). In this regard, HDA commissioned a third-party benchmark industry-wide salary survey, and identified a number of anomalies.

4. That the organisation deal with its contractual obligations via the implementation of effective controls (policies, levels of authority, accountabilities, sign off procedures and associated systems) in order to avoid the ambiguity and potential for risk around the company's contractual obligations.

As a result of HDA's intervention, the Board made a number of immediate key decisions at its next Board meeting, including the following significant structural and commercial adjustments:

- the temporary installation of an interim CEO,
- the appointment of one of the NED's as COO ahead of the planned future hire of a new CEO
- the appointment of the incumbent CEO to the role of Executive Chairman, and the shift of the incumbent Chairman into an NED role
- the replacement of a number of outsourced resources
- the writing of a detailed and realistic business plan which would both pre-empt any future funding due diligence, and which would focus the Board's attention on a sustainable and rationalised strategy.

The organisation has started production and continues to face a number of challenges – primarily internal, and at senior management level. HDA's intervention was however seen as instrumental in ensuring that the Board and organisation did not "self-destruct" at the time of its intervention, as a result of avoidable leadership disaffection, an underdeveloped business strategy and an underdeveloped organisation structure.



HDA Case Study 7 (Change/Transformation– Research Institute)

The Client

From its foundation in 1909 as a small research department within a UK Hospital, the organisation has grown to become one of the world's foremost independent research institutes; internationally renowned for the quality of its science. The company is assisted by Corporate Services – the collective name given to the various support functions within the organisation. The Corporate Services operate as fairly independent departments with respective Service Directors coming together formally every six weeks (as the Corporate Services Board) to discuss current work. All Corporate Services promote a focus on continuous improvement and have exhibited consistently improved customer service ratings in recent years.

Background

It was however recognised that in order to achieve the organisation's ambitious growth plans, the Corporate Services functions would need to undergo significant change. In order to 'kick off' the transformation programme, the Head of Corporate Services commissioned HDA to facilitate an event with the respective Heads of the various support functions within the organisation.

The HDA Process

HDA consultants met with each member of the Corporate Services Board for a detailed 1:1 exploration of the future challenges faced by the Board both in terms of what needed to be achieved and how it could be achieved. Through these interviews, key themes emerged and it was these themes which were then fed back to the entire Board at a one-day, facilitated workshop. This workshop was designed to explore new ways of working, air individual ambitions and preferred ways of working, and also to share perceptions.

Outcomes

Through HDA's involvement the Corporate Services Board "has started on the road to even more productive team working. The workshop reinforced our values as the Board and our philosophy of continuous improvement. It encouraged us to continue to strive to be greater than the sum of our 'expert' parts" (Head of Corporate Services).

HDA Case Study 8 (Team Facilitation – Manufacturing Industry)

Business Context

One of the world's leading producers of fast-moving consumer goods develops global strategies at the Düsseldorf Head office. The various operating regions are then required to interpret and implement these strategies, taking into consideration individual issues and context.

Business Issues

The global HR strategy was delivered in the form of a series of OGSAM tables relating to key business issues. These tables specify the Objectives, Goals, Strategies, Activities and Measurements to address key issues. A subsequent HR conference presented these strategies with an explanation of the OGSAM approach.

The Director of HR UK & Ireland wished to engage his management team in the translation of the global HR strategies, while also engendering team working and motivating the team to engage with the strategies. He chose to meet these objectives through a workshop.

Business Value Obtained from a facilitated workshop

The 2-day workshop comprised of three hours of activity on the first afternoon based around a team building approach. This was followed by six hours of activity on the following day to translate the global strategy.

As a result of the first phase of the workshop:

- The team identified areas where they could work more effectively together and also behaviours which would enable this.
- New team members were integrated.
- The team gained an understanding of the need to recognise the specific issues of the various sites.
- The team highlighted that their regular management could be used more effectively to encourage ownership of and focus on key issues as well as using the considerable expertise in the team.

During the second phase the team focused on the global strategies and developed their own strategies and activities to deliver them. The team identified process and systems issues that need addressing if UK & Ireland are to contribute effectively to the global strategy and the demands for change. Involvement in the development of their own OGSAMs enhanced team motivation to deliver the strategies as well as encouraging a greater understanding of how the team can influence the corporate centre, add value, and also demonstrate that value to their business customers both locally and in Düsseldorf.

Business Outcomes

The generation of the UK & Ireland OGSAMs will focus the attention of the HR team on delivery that will contribute to the global HR strategy and the corporate change agenda.

In addition, the team is more focused on cost efficiency and the areas in which they can add value to the business.

HDA Case Study 9 (Engaging Internal Stakeholders – Automobiles Industry)

Business Context

The organisation brand has a fantastic reputation, (innovation, integrity, sustainability...the list goes on...) and few would not want to be associated with it, whether outside or inside the organisation.

The organisation's Europe, UK and Finance Europe divisions experienced a major organisational restructure in 2006/7 as part of a general rationalisation of the region, and HDA partnered with them through this process to manage the people component of the change process.

The positive effects of any organisational transition always go hand in hand with a degree of fear for the future within an organisation, resistance to change where that change is not well understood, or not considered valid, and possible disengagement with the objectives of the organisation. This has potential to impact team morale, performance and subscription to organisational values and forward strategy.

Whilst the organisation restructuring was handled particularly well, in accordance with an organisation which was proud to be voted in the top-40 **Sunday Times 100 Best Companies to Work For** organisations between 2003 to 2006, and despite excellent results achieved in 2003,4,5 from the organisation's own internal European 'Spirited Independence' survey, the organisation's leadership nevertheless believed that a targeted survey of engagement levels across the organisation, post transition, would be an essential initiative to positively take the business forward with firm commitment to agreed principles after a brief period of dissonance.

HDA Project

HDA and the organisation communicated the objectives of the engagement measurement process to associates and contractors under the following key headlines:

- We are setting out to 'pulse test' the degree to which people across the organisation are *'engaged'* with the objectives of the organisation, and the degree to which there are any specific factors across the organisation which need to be managed to improve Associate engagement levels.
- We are aware that there are many creative minds working within the organisation and this survey provides the opportunity to capture and nurture some of your ideas.
- We are keen to identify manageable issues which can be *constructively* dealt with – despite the organisation conducting regular internal surveys, we are not about measuring opinion, or creating metrics, or creating benchmarks(*) in the first instance, but, rather, we want to get a feel for how engaged people are with the objectives of the organisation during 2007 and moving forward, (with specific reference to the organisation's **84ki** strategy). (**Bearing in mind that any internal engagement benchmarks will of course be referenced in future surveys by the organisation*)
- For this reason, the survey process is not overly complex, and it is intended that the results of the survey are capable of being followed up in a managed, systematic fashion
- We want to place ourselves in a position to comprehensively manage reasonable continuous improvement in the organisation, based on survey outcomes



Our Objective then was to measure and *deliver meaningful feedback on Associate engagement across the organisation, diagnose the real situation, and take measurable actions to continuously improve the organisation.*

The Project

HDA worked with the organisation to identify an optimal question set to measure key responses across a number of key components of the business, including, views on:

- How easily things get done
- Satisfaction with role
- Values
- Work-life balance
- Information
- Rewards & Recognition
- Management
- Work Environment
- Products and Service

The HDA survey was conducted 100% online across the UK and Finance Europe divisions under a general '**More Forwards**' theme, and included all Associates and contractors.

Both quantitative and qualitative questions were included; the latter adding rich verbatim accounts of life within the organisation.

Whilst participation was on a strictly voluntary basis, 85% of the UK division and targeted the Europe division's Associates and contractors participated in the survey, and 89% of the Finance Europe division's Associates and contractors participated. This very pleasing response rate was driven by a highly transparent process and committed communication within the organisation.

Results

The survey results provided rich insights into levels of organisational engagement, and guidance was provided by HDA for the organisation to independently move forward as follows:

1. Agree a Strategic Response to the Survey:

- with regards to talent attraction,
- with regards to talent engagement,
- with regards to talent retention,
- with regards to a sensible *combination* of these, in line with existing strategies in these areas

2. Acknowledge the most likely Associate engagement opportunities and threats for the organisation as a whole and focus managerial attention on these.

3. Agree on areas that are commercially out-of-bounds.



4. Identify potential 'quick wins'.
5. Openly communicate company-wide survey outcomes with the Associate team, and agree a manageable mechanism for tracking '**More Forwards**' progress against those outcomes which the organisation believes are manageable.
6. Engage a cross-functional team to consider implications of the survey, and opportunities for addressing company-wide issues via intelligent quick wins which are indicative of positive intent around the '**More Forwards**' theme.
7. Identify any demographic exceptions of interest / concern, assess and manage these.

Whereas many organisations undertaking staff surveys set out to benchmark themselves against other organisations and within sectors, with little context as to why results across different organisations may be different; HDA strongly discourages organisations it partners with from taking this largely academic approach where the survey itself is seen as the end in itself, rather than a means to a more valuable end which *commits* the organisation's leadership to transparently act on the results of any survey conducted, given the commitment that respondents are putting into participating in the survey.

One of HDA's key themes therefore in working with the organisation, was that the organisation should seek to identify and feed off of **internal benchmarks** for the organisation – ie. engagement exemplars for the organisation as a whole, whether these be at business unit level, at departmental level, or whether these exemplars are located within a specific demographic group, *eg. short-service staff within customer services with less than 2 years' service*, etc.

On this basis, HDA identified a number of exemplars of notably high engagement levels within the organisation, including within the UK division's Press & PR and Customer Service (Cars), the Finance Europe division's New Business & Customer Service and HR Operations. The organisation was encouraged to consider what qualities stand out in these areas across the engagement components measured, and to feed any internal learnings from this process across the organisation.

The organisation has gone on to transparently address key issues identified by the survey process, with reference back to the survey, and it is envisaged that the process will be replicated.



HDA Case Study 10 (Team Facilitation – Public Sector Industry)

Business Context/Objectives

The organisation was interested in employees within different business units and functions coming together to work more effectively as a team to achieve the business objectives. HDA was commissioned to work with a group of 28 employees from various functions within the organisation (Life Long Learning, HR Policy, Facilities, Estates, Pay, Pay Modelling) in order to:

- To get to know each other better;
- To gain an in-depth understanding of the roles and activities; and
- To develop an improvement action plan for moving forward.

HDA Approach

A group sharing session aimed at comparing perceptions of roles, activities and accountabilities to the reality. Through this process an in depth understanding of each of the functions was developed.

Barriers in terms of behaviours and processes were flushed out, in a 'stop it / start it' session which also focused on getting the group to think about how to identify and share best practise and improve communication.

A final session on 'quick wins' was very productive with good participation from the individual function groups.

Business Outcomes

The teams gained a fuller understanding of various roles within the organisation, while also developing structured action plans with clear ownership and accountability for each action. A culture of continuous improvement and individual / team ownership for driving things forward was engendered and motivation for achieving success was established by identifying a sizeable number of cost effective 'quick wins'. A means of sustaining this culture of continuous improvement was created by putting in place a means for each function to present back progress on their action plans at their next directorate meeting.



HDA Case Study 11 (Team Facilitation – National Health Service)

Business Context

An NHS Trust had been through a turbulent couple of years and were likely to continue to operate in a changing environment for the foreseeable future. Recognizing the impact on staff of working in an ever-changing environment, the Trust commissioned HDA to support the staff through these changes, with principle objectives being, to:

Create awareness of the impact of change and to enable staff to develop a sense of understanding in order to managing personal reactions to it

Enable staff to acknowledge the impact of change on levels of stress and distraction

Reinforce the positives of change and create an understanding of how to thrive during times of change

Acknowledge areas of staff concern - providing a confidential environment for staff to express their concerns

HDA Approach

Over a year long period, HDA facilitated a series of ½ day sessions on 'Coping with Personal Change'. These sessions provided staff with the opportunity to learn more about the change process in order to develop a greater understanding of the impact of change both on them as individuals and on the organisation as a whole; while also gaining insights into effective tools to enable them to manage the change more effectively.

The facilitations consisted of groups of staff, across various business functions, coming together to share their thoughts on changes taking place within the Trust, including discussions surrounding the impacts of the changes at a personal and organisational level; barriers (both behavioural and process driven) to the changes; tools and techniques for coping with the changes; and developing a plan for moving forward.

Business Outcomes

- Understanding change - through the sessions an in depth understanding of the change process and how to manage change effectively was developed.
- Peer support - staff were given the opportunity to learn from one another and to recognize that they are not alone in finding change difficult or challenging.
- Communication skills - staff developed a greater understanding as to how to communicate with colleagues during times of change in order to minimise negative reactions to change.
- Stress management - staff learned how to recognise the impacts of change on stress levels and Stress management
- Improved performance – by managing stress levels and developing a greater understanding of change, staff are better able to perform during times of change both as individual staff members and also as managers.



Organisational Comment:

“All staff that attended found it highly beneficial and were impressed with the high calibre of the HDA facilitator who was able to relate to staff at all levels”.

(Human Resources Director)