



Case Study: Finance

CLIENT PROFILE:

Private Financial Services company

INDUSTRY:

Finance

LOCATION:

USA

TEAM TYPE:

Intact, Cross Functional/Operations

TEAM SIZE:

15

SITUATION:

- > Historical culture of entrenchment, avoidance of issues, and blaming. Interaction and respect was strained.
- > Learning and innovation was limited. There was considerable untapped potential.
- > Past versus Future thinking created team divisions and resistance to change.
- > Lack of focus on shared goals and ability to constructively work through differences got in the way of achieving business results.
- > Work was done in independent "silos" instead of as an interdependent team.
- > Best use of resources was hindered, which limited timely delivery on goals.

Business Improvements

- ▲ **+19% Productivity**
- ▲ **+24% Positivity**

SYNOPSIS:

The team had fairly clear goals but lacked alignment at the strategy and tactical levels. They recognized their strengths: diverse backgrounds and experience, wide knowledge and expertise, leadership, and motivation to succeed. But they didn't know how to utilize these strengths to point everyone in the same direction.

Their biggest barriers were ineffective communication tactics like blaming and stonewalling, conflict avoidance, and not leveraging their diverse talents and strengths to achieve team goals. They wanted to improve their alignment and ability to work together as a team, rather than focusing on individual agendas.

Using the **Team Diagnostic™**, the team's strengths and challenges were fully revealed. And through the process of team coaching and creating clear team agreements, the team shifted from working in silos at cross purposes to being aligned around shared goals and strategies to achieve business results.

- > **Fiscal results increased >40%**, with considerable improvement in the first 60 days of the change program.
- > **Overall staff levels are down ~10%**, getting more done with less.

APPROACH:

- > The program lasted a year and a half.
- > Pre- and post-program measure was the **Team Diagnostic™** and the 14 factors of Productivity and Positivity.
- > Business measures: Fiscal results.
- > Baseline results were followed by a series of team coaching sessions.

RESULTS THE TEAM REPORTED:

- > Our team and the company has had the most successful ½ year in the company’s history.
- > The team has evolved from incomplete communications/relationships to healthier patterns with well intended interactions.
- > There is a more sincere effort across the various roles to contribute toward attaining goals in the big picture.
- > The team has grown leaps and bounds. There is more trust, respect and appreciation than there ever has been.

Highlights

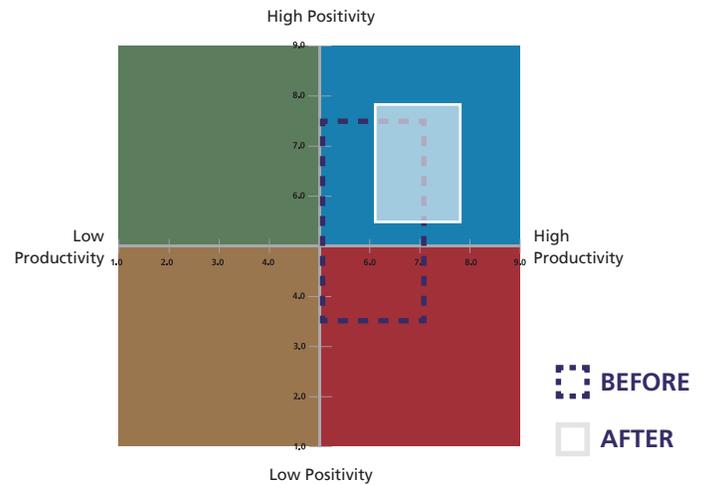
+19% Productivity

Alignment +24%
Accountability +22%

+24% Positivity

Trust +31%
Constructive Interaction +29%

Benchmarks



For more information on achieving an **average 20% improvement** in Productivity & Positivity conditions using the **Team Diagnostic™** please contact us at:



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