

# A Fast-Tracked Leadership Team

## Personalysis Short-cuts Merger Chaos to Get Results

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### Overview

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- **The Challenge**  
*Companies' merger creates unintended confusion and disorder as people and systems are integrated*
- **The Solution**  
*Focus leaders' attention on unifying processes to find, address, and implement quick wins for the merged function*
- **The Benefits**
  - *Reduce start-up time from 6 – 9 months to 1 – 2 months*
  - *Minimize floundering and upsets*
  - *Increase productivity*
  - *Integrate systems and centralize processes*
  - *Create a high-performing leadership team*
  - *Build positive relationships from the beginning*
  - *Develop new leadership competencies*
  - *Highlight best practices of each bank*
  - *Identify redundant or inefficient processes*

**“The Personalysis Business Solution is so effective...why haven't we been doing this for the last 20 years?”**

— CIO Technology Services



### ONE TEAM'S SITUATION

As a result of two large banks merging, Technology Services decided to centralize the project management function to reduce costs, ensure consistency, and gain better control of the projects. Prior to the merger, each Program Manager, supervising numerous projects, had reported to the CIO of discrete business areas—treasury, insurance, international, etc. With the creation of the Project Management Office (PMO), a new leader was required to oversee the numerous projects and three hundred people.

During the internal search, three Program Managers applied, and one was chosen as the new Program Office Manager. After floundering for three months, the Program Office Manager went to her leader, the SVP of Technology & Integration, and requested help. Personalysis Corporation was asked to assist the new PMO (Project Management Office) leadership team to get them functioning quickly.

### UNCOVERING THE PROGRAM MANAGERS' ISSUES

A meeting was convened with the SVP, the Program Office Manager, her six direct reports (Program Managers), and the Personalysis Corporation team of Consultants. The SVP announced that Personalysis Corporation had been engaged to assist them and gave his rationale for doing so, encouraging honesty, openness, and cooperation. The Personalysis Consultants overviewed their proposed process, with the first step being confidential, one-on-one interviews with the Manager and each of the Program Managers commencing immediately.



After analyzing the data, ten common themes emerged. They included:

***“I believe this process chopped off six months of time, eliminating the nonproductive blundering.”***

—SVP Technology & Integration

- Problems in acquiring and developing talent
- Lack of a common vision
- Geographically dispersed
- Everyone functioning in hyper-mode
- Questions about being a team (or not)
- Lack of relationship among the members
- Bogged-down process
- Coping with change
- WIFIM not addressed
- The Manager—an unknown

The Personalysis Consultants presented their preliminary findings to the Manager and worked with her to increase her understanding of her direct reports as well as develop immediate success strategies to employ with them. She was also assigned a significant amount of “thinking” work to do. Lastly, a process for measuring results of the Personalysis intervention was agreed upon.



### **STAGE ONE: DISCONNECT**

The reorganization had created upset, confusion, and some defensiveness. Most felt demoted, and two felt a loss of face, since they had applied for the Manager’s job and didn’t get it. Additionally, a former peer was now the leader, which created an awkwardness they were not equipped to handle. Bottom-line: they were a team in name only. They were not able to function as a team because they weren’t a team. The DISCONNECTS were symptomatic of:

- Floundering
- Not understanding their current state
- Having little infrastructure
- Being strangers
- Not knowing their leader
- Having no defined common goals

### **STAGE TWO: ROADBLOCKS—IDENTIFIED AND ADDRESSED**

During the first teambuilding session, the Program Leaders developed an understanding of the issues which blocked and inhibited their effective functioning as a team. Once they had a clear picture of their current state, they agreed on a desired future state, identified the “gaps” which needed to be addressed, and volunteered to work on “quick wins” for the team. Each member then received individual personal coaching to understand self and the others and to create strategies for coping with the job stress, using personal strengths within the team, and engaging positively with the Manager.

Two weeks later, the Program Leaders regrouped for a second teambuilding session and began functioning as a decision-making team. As they wrestled with creating their infrastructure, the motivation to become a peak-performing team became apparent. The Manager was thrilled when she experienced them “all in the truck” and ready to move with her.

### **STAGE THREE: TEAMWORK AND INTEGRATION**

After only a month, the PMO Leaders bonded as a team and began the work that would benefit them all. This was evidenced by development of infrastructure, recognition of individual strengths, buying-in to common goals, interdependencies, mutual accountabilities, and knowing their leader and each other.



***“The coaching and support provided by the Personalysis team has been invaluable in expediting the formation of the PMO Leadership Team. They have allowed us to reduce our teambuilding work by months.”***

—PMO Manager

***“This experience opened my eyes to the different personalities and how best to approach and use others’ strengths.”***

—Program Manager

## **Infrastructure**

The Technology Services PMO leaders developed infrastructure to facilitate their operating as a team, including:

- A name for themselves
- A Technology Services Project Management Office vision and mission
- Operating and decision-making norms for the Leadership Team
- A priority list of urgent needs
- A list of each person’s expertise as a resource to the team
- A desired future state

## **Individual Strengths**

Because most of the team members were previously strangers, getting to know each other both personally and professionally was critical to coming together as a team. The Personalysis assessment provided a roadmap for each individual—identifying individual strengths—and permitted them to understand themselves and each other.

As one Program Manager said, “Personalysis helped me to gain a better understanding of myself, others on my team, and the value that the team’s differences affords us as we move forward. I absolutely embrace the unique qualities/styles that will make us stronger as a team, and I am thankful for the new insight I have gained which allows me to feel camaraderie with the team that I didn’t have before.”

## **Common Goals, Interdependencies, and Accountabilities**

While all of the Program Managers had designated lines of responsibility in different businesses, as a shared leadership team, common goals, interdependencies, and accountabilities required definition. Delineation of the vision and mission began this process; discussions exploring mutual commonalities created the awareness that interdependency and accountability existed. Identification of a list of critical and mutual “quick wins” energized the team to put the concept into practice as various members volunteered to take responsibility for an integrative task, which resulted in a “win”—success for everyone.

## **Knowing their Leader and Each Other**

Because the individual members of the leadership team were strangers to each other, they “played it safe” by remaining passive and watching. Their Manager was frustrated: “Given what they are being paid, I expect them to step-up!” She expected them to “hit the ground running” as a fully functional and integrated team. As she realized that her team was in its infancy and accustomed to operating in two different cultures and systems, she understood their dependency on her. What was obvious to her was invisible to them, and they were waiting for her to clarify her expectations and guidelines. When she verbalized her vision and mission for the PMO, the commonalities they shared, and her expectations of herself, of



***“The individual and team coaching was very timely given the newness of the team and relative lack of experience with each other. We also got through some specific ‘team’ tasks like creating the vision and mission statements.”***

— Program Manager

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***Return on investment realized through returning six months of lost team productivity***

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them as a team, and of them as leaders, the Program Managers were visibly relieved. In turn, they were willing to offer opinions and be an active part of creating a new culture.

“I found the Personalysis assessment and interpretation to be very insightful. On a personal level, it has helped me better understand myself in regard to the ways that I think and approach my work. From a team perspective, I found the results to be an excellent way to get acquainted as a new group.”

#### **STAGE FOUR: CULTURAL TRANSFER**

As the leadership team began to experience the benefits of working together and concrete results, they embraced their future challenges both as a leadership team and as individual leaders. They identified specific time accountabilities for their deliverables and established a plan to meet together once every two months to continue their important systems integration work and their goal of becoming a high-performing team. Since the Program Managers’ teams had many of the same issues due to the merger, they formulated a process, using themselves as a model, to assist each Program Manager’s team in accepting the new culture and systems. They committed themselves to “walk the talk” of their newly created culture and agreed upon ways of holding each other accountable as well as supporting one another in the journey forward. Modeling desired behaviors proved to be the fastest way to embed the culture throughout the organization.

#### **STAGE FIVE: GOALS ACHIEVED**

The first three stages deal with the creation of a new culture along with the necessary infrastructure, systems, and regulatory accountabilities. Stage Four begins the process of cascading the culture to the rest of the Technology Project Managers. As all of the people within the PMO give up some of the old and accept the new changes, they also must attend to keeping the new culture healthy. By teaching the leaders how to create and sustain a healthy environment, the PMO actualizes the goals of creating a positive, productive culture as a result of the merger. Not only are the leaders empowered to streamline processes, reduce duplication, ensure regulatory compliance, and consolidate systems, they are much more effective and productive leaders of their people.

