The **achieve** Institute

achieved it.

Rapid change inevitably feels like a plunge into the unknown.
But the results can be transformative – if organizations avoid the pitfalls.

Discover how 3 enterprise-level clients applied the *Achieve System™*
to turn accelerated change into lasting transformation.

Do you have a change acceleration gap?

There's often a gap between the pace of change needed for effective business transformation and the ability of an organization to sustain – or manage – that pace. This acceleration gap can be costly and painful, particularly for enterprises structured around decentralized, yet interdependent, functions.   For many organizations, the continued disruption of a global pandemic is further widening the gap.

In 2021, 63% of CEOs reported their current processes and execution are too slow.*

Yet it's possible to achieve extraordinary results in the midst of unprecedented change and transform your organization for lasting high performance at the same time. Implementing the *Achieve System™* is like giving your organization the missing "instruction manual" on how to do exactly that.

Different clients. Different challenges.
What they have in common: using the *Achieve System™* to create positive transformation from disruptive change.

JUMP TO CASE STUDY 1	JUMP TO CASE STUDY 2	JUMP TO CASE STUDY 3

FORTUNE 50 TECHNOLOGY COMPANY

How the leader of an operational Customer Care business unit used the Achieve System to drive transformational process change and centralize process execution across the unit's 27,000 employees and 80 million customers.

FORTUNE 100 HEALTH INSURANCE COMPANY

How the CEO and executive team used the Achieve System to prepare for and navigate the whole enterprise through the Affordable Care Act's major transformation of the health insurance market.

FORTUNE 100 TECHNOLOGY COMPANY

How the CIO used the Achieve System to accelerate IT transformation and strategic business alignment to take a key department from "doing" to "leading".

Engagements Calibrated To Your Organizational Structure and Culture.

Using the *Achieve System™* makes teams and organizations more agile, better at managing risks and better able to accelerate change and innovation, often far beyond what they previously thought possible. Change management and business transformation are among the most common Achieve System applications.

6-12 month engagements with c-suite and senior leaders:
Immersive personalized programs, one-on-one performance coaching, deep methodology training

C-Suite / Leadership
up to 20+

6-12 month customized leadership / team engagements:
comprehensive program with workshops, one-on-one coaching, eLearning on methodology application

Executive / Management Teams
up to 300+

Multi-year, scalable adoption of methodology:
comprehensive or tailored programs with workshops, one-on-one coaching and eLearning

Business Units / Functional Teams
300 - 1000+

The more you scale the system, the more effective it becomes.

From individuals to teams to entire organizations, the *Achieve System™* gives you a systematic way to model and create high performance that ensures your gains are repeatable and scalable, and that your culture achieves a lasting transformation.

Enterprise Wide / Licensing

10,000+ Enterprise level

Executing a process change is not the same as achieving business transformation.

When done well, driving change to accelerate business transformation can also enable people, teams and entire organizations to reach their full performance potential.

This was the experience of a **Fortune 50 technology company** when its leadership decided the time was right to make a necessary and significant change to its Customer Care process.

APPLICATION ROADMAP

1

Guided by a 2-person Achieve Institute delivery team, the operational leadership of the Customer Care business unit first used the *Achieve System™* to shift their "worldview" of the customer, unexpectedly recasting what they had erroneously believed to be an *'employee experience'* problem.

Teaching people and teams how to upgrade their worldview is part of the Achieve System's **Operating Framework –** a potent high-performance methodology that addresses the impact of factors like our identities, relationships, beliefs, habits, emotions and other behavioral drivers.

A crucial intervention involved changing the team's unquestioned belief that their customers were making their jobs more difficult. Creating a more positive view of the customer not only provided a much-needed boost in customer appreciation, it elevated the team's overall identity with immediate and positive impact: the operational leadership team became much more receptive to driving a process change, and considerably better able to do so.

2

Next the team applied two of the most powerful tools in the methodology: **Create, Don't Fix** and **Connect to Possibility.**

Calling to mind Albert Einstein's famous observation that *"You can't fix a problem with the same thinking that created it"*, both techniques are core elements of the system's proprietary **Achieve Approach,** proven to teach individuals and teams how to engage in more creative thinking and create more more innovative solutions.

As daily performance and results continued to improve, operational leaders expanded the engagement from 6 months to a full year, pulling in all 250 of the business unit's leaders and expanding application of the methodology to include additional group sessions, eLearning and interactive workshops.
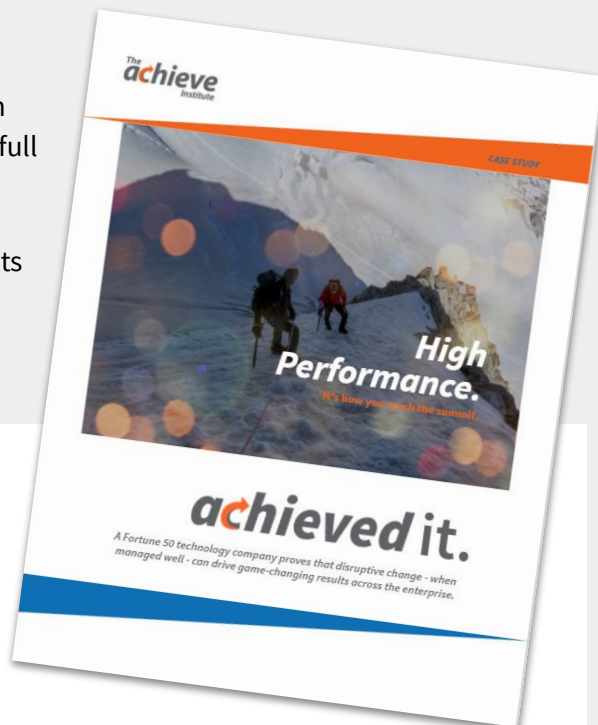
3

The entire leadership team was now working to define what a successful process transformation would look like when things were working well, using the Achieve System methodology to understand the organization's Point A and create a new **Point B**.

Our Point B methodology uniquely empowers leaders and teams to shift from being fixated on their "rearview mirror" to being propelled into the future with a clear destination.

Instead of setting goals for plan execution, the leaders detailed what success would look like across all aspects of the Customer Care business unit, allowing teams to immediately begin setting new targets based on achievable possibilities rather than on past experiences and limitations.

Some new targets were based on higher net promoter scores and improved first call resolution numbers. Others focused on productivity measured by call-in rates, credits per call and similar metrics. But all were integrated to create an overall customer experience and end-to-end vision that people found exciting and appealing, boosting performance and results in real time.

The year came to a close with sustainable transformation underway, and short-term gains that were impressive all on their own: the organization had already driven a 20% reduction in operating costs generating $200M in annual savings. It was time to take the new process to all 1,000 unit employees.

4

Moving into year two, rapid change was cascading across the Customer Care business unit. The Achieve System methodology and language had quickly become part of the organization's DNA, replacing old ways of thinking with breakthrough thinking that helped generate ever-increasing results.

Another innovative technique of the system, **Best Actual**, became a sustained change driver, ensuring ongoing increments of success with a focus on progress, not perfection. Across the organization, leaders shifted from a sole focus on hitting numbers to instead optimizing opportunities that allowed their people to perform at their best, moment to moment, day to day.

Not surprisingly, when the company decided a few years later to fully integrate all the Customer Care units into a centralized operation, the same two delivery coaches were invited back to help successfully guide a customized Achieve System application once again. According to the unit VP, within 18 months *"every aspect of what 30,000 people did on a daily basis had been affected and improved by what our leaders initially learned and applied using the Achieve System's methodology."*

Throughout it all, new customer growth steadily rose by 20%. Annual cost savings reached $500M. And customer and employee satisfaction ratings soared, with the unit receiving top satisfaction ratings from both customers and employees for years to come.

operating
framework

achieve
approach

" ***If you want to drive breakthrough and transformational thinking into your organization, I recommend you look at the Achieve System as a tool to give you a competitive advantage.***"

POINT A

Before the *Achieve System™*: the VP of Customer Care at this Fortune 50 technology company had been tasked by the company's CEO to accelerate a critical process change. The charge was not simply to cut costs, but to improve the customer experience and increase employee satisfaction while doing it. To help, the VP had started with a business unit operations team of Six Sigma black belts and the company's brightest IT minds.

POINT B

After the *Achieve System™*: the organization saw a 20% reduction in operating costs and $200M in savings in the first year; up to $500M annually after 2-½ years. Even more impressive was the effective process centralization across thousands of employees despite adding 20% more customers at the same time. All while improving customer and employee experiences. Meanwhile the company also swept JD Power awards for service over the next four years and consistently improved internal employee survey results.

Bottom line results?
Accelerated process transformation that enhanced the customer experience, improved employee satisfaction and dramatically decreased costs – all while the customer base continued to grow. This success ultimately paved the road for a highly cost-efficient centralization of all business unit divisions a few years later.

ROI Highlights

A **20%** reduction in operating costs with **$200M** in the first year.

After 2.5 years, cost savings hit **$500M** annually, while the customer based grew by **20%** during the same time period.

The business unit swept the **JD Power Best Customer Service Awards** for the next four years.

The business unit's ***Employee Experience & Customer Performance Recognition*** survey results consistently improved as well.

BACK TO OVERVIEW

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Cut costs. Delight customers. Keep growing. And keep employees happy while doing it. That's a tall change order.

The CEO of this Fortune 50 technology knew it was a very big ask: *make changes to improve customer service effectiveness while reducing departmental costs and supporting customer growth at the same time.*

So when he tapped the VP of Customer Care for the job, he also assigned an operational unit's specialty team of six sigma black belts and the brightest minds in the organization's IT department to help.

This superstar task force quickly determined that the underlying problem was a badly broken customer service process. But implementing a significant process change to *fix the problem* presented a tougher challenge. Says the VP *"The usual way we approached such a change was to set a target and see what fixes and steps were needed in order to hit the target."*

This time, though, the team felt certain that their traditional approach to making a process change would fail to deliver the desired results. They needed a way to ignite some fresh thinking.

Achieving faster, better, scalable transformation.

The *Achieve System™* immediately helped the team take a different approach. Instead of gradually fixing their process with incremental changes, goals and steps, these leaders applied the system to more clearly define the challenge - and to consider what the new process could look like across all aspects of customer service.

Although at first small in scale, the leaders quickly embraced "*taking a new look at how we performed and behaved, how we felt about our customers, how we presented information, how we analyzed our customer feedback surveys, how we recognized our team members' accomplishments, how we used our*

BACK TO OVERVIEW

"My team and I not only changed the process, we created an award-winning solution that improved the entire customer experience and dramatically decreased costs while our customer base continued to grow."

"The Achieve Institute provided us a disciplined approach and a new way of thinking that gave us better results than we predicted – better than we we could have imagined with our old way of thinking – and it led to true breakthrough thinking."

customer service desktop technologies, and more," reported the VP, *"many things we would have never given a second thought about in our old mindset."*

Once the leadership team had learned how to *connect to possibility* and *create new solutions* rather than fix old problems, they rolled out their new process change to the rest of customer service leadership and management.

The bigger the scale, the more spectacular the results.

From the start, results were even better than initially hoped for.

First, operating costs dropped by 20% for $200M in savings in the first year, and was generating $500M in annual savings after two-and-a-half years. Meanwhile, the customer base just kept on growing – increasing by 20% during the same time period.

More remarkably, the customer experience simultaneously and significantly improved – with the business unit going on to sweep the *JD Power Best Customer Service Award* for the next four years.

You might expect all of this disruptive change and ongoing growth would take a negative toll on the employees. But the unit's *Employee Experience & Customer Performance Recognition* survey results likewise improved consistently over the same time period.

The VP noted that he soon had other leaders in the organization showing up on his doorstep, asking for the secret sauce to his success. Ultimately, their initial process transformation led to a second Achieve System application, this time to integrate and centralize what 30,000 employees did on a daily basis.

Says the VP, *"If you use the discipline and tools of the Achieve System, changing how you do business can drive exceptional results all across the board."*

Ask the owner of any pro sports franchise: a collection of high-performing individuals is not the same as a high-performing team.

For the brilliant and visionary CEO at the helm of a **Fortune 100 healthcare insurer,** the choppy waters created by the Affordable Care Act (ACA) revealed a painful reality: a collection of individual superstars does not by itself make a dream team.

An eye-opening conversation with a senior Achieve Institute performance expert led to an intense, high-level engagement that provided what was missing: alignment on common goals and shared accountability for achieving them.

APPLICATION ROADMAP

1

The CEO was a leader in the healthcare insurance industry, with an executive leadership team (ELT) whose members had impressive track records all their own. But when the ACA disrupted how the company did business, cracks quickly appeared in C-suite solidarity. Siloed thinking and misalignment on goals and strategies were stalling the critical internal and customer-facing changes required to make the new insurance marketplace model work. The company needed to take bold steps – but leadership was challenged to agree on the best course.

As a first step, the Achieve consultant met one-one-one with ELT members to better understand their work styles and to introduce core concepts of the Achieve System. Pushback was swift – "Who are you and what do you think you know about our business that we don't?" Only once ELT members understood that the Achieve System addressed *how* people worked, not *what* they worked on, did objections cease.

At first, everyone was keen to air their grievances and ruminate on why the executive leadership wasn't working well together.

"I get it," the consultant would answer. "But If you *were* working well together, what would that look like?"

2

The CEO next invited the Achieve consultant to attend the next ELT meeting. The CFO, a key voice to the CEO, was initially skeptical: "Why are we doing this?" The Achieve performance expert didn't speak during the meeting. But the question he'd posed to the ELT beforehand – itself part of the Achieve methodology – had primed the company's leadership to cease fixating on their perceived problem and instead to begin creating a different kind of future.

After the meeting, the CFO announced, "This was the most successful meeting we've ever had."

Of course the ELT still had issues. While the group had individual targets and plans, they weren't aligned on Point Bs for the enterprise and lacked a shared commitment for executing their strategic plan. That created a disconnect between teams and confusion about the direction the company was headed.

As the CEO put it, "I've got 35,00 people coming to work every day and we can't tell them where we are going?"

The CEO then arranged for an off-site ELT meeting to further explore exactly that question under the guidance of the Achieve System consultant.

3

As one of the first orders of business at the off-site meeting, the Achieve System consultant had them identify the 10 things they did as a company, and to create Point B's for each.

This created the all-important alignment that had been missing. Once they all agreed on the top 10 needed goals and what success would look like for each, the ELT members were able to work effectively with each other. Even more importantly, their respective departments and teams were able to work together.

By implementing the Achieve System framework, the ELT members committed to work as a high performing leadership team – not simply as high-performing individuals – and began finding opportunities to excel as a world-class team.

4

But the results didn't end there. Levels of management under each C-suite team member saw the change and emulated it, and once the ELT began using the Achieve framework, all 35,000 employees began pulling in the same direction.

To ensure that the ELT remained aligned and committed to high-performance, the CEO included the Achieve performance expert in the company's ELT meetings for the next four years – a practice that only ended when the CEO retired.

"These were top-shelf leaders," the Achieve consultant observes. "They didn't need advice on strategy. They didn't need coaching on what to do to run the company. They just needed a different approach to how to work."

operating
framework

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" *The **Achieve System™** is the best 'cat herding' tool I've ever used."*

– CEO, Fortune 100 healthcare insurer

POINT A

Before the *Achieve System™***:** the CEO and executive team of this Fortune 100 health insurance company were racing to catch up along with everyone else as the ACA began to dramatically change the traditional operations of health insurance companies in ways that affected their administrative expenses and premiums – as well as their resulting profit margins – and prohibited them from considering subscribers' health status or risk.

POINT B

After the *Achieve System™***:** the leadership team successfully came together, aligning on the key initiatives and challenges facing the organization, and working in sync to create a clear, agreed-upon path to move the company forward across the first years of the ACA rollout.

> ### Bottom line results?
> **Transformation of the Executive Leadership Team not only kept the company's overall performance strong, but led to enhanced talent and overall business performance.**

ROI Highlights

The stock value of the company doubled over the first four years of ACA rollout.

Tensions and divisions between old and new C-suite executives were resolved.

Alignment on Point B's for the most critical initiatives the company faced galvanized 35,000 employees.

Upgrading how your people think, plan and work is how companies transform to thrive in the new normal.

A **Fortune 100 tech company** was eager to elevate and expand its IT department's role in driving innovative. Being competitive in an industry that evolves fast demands an optimized talent capitalization rate.

So the company's CIO used the *Achieve System* to make sure her IT team would show up ready and able to deliver peak performance.
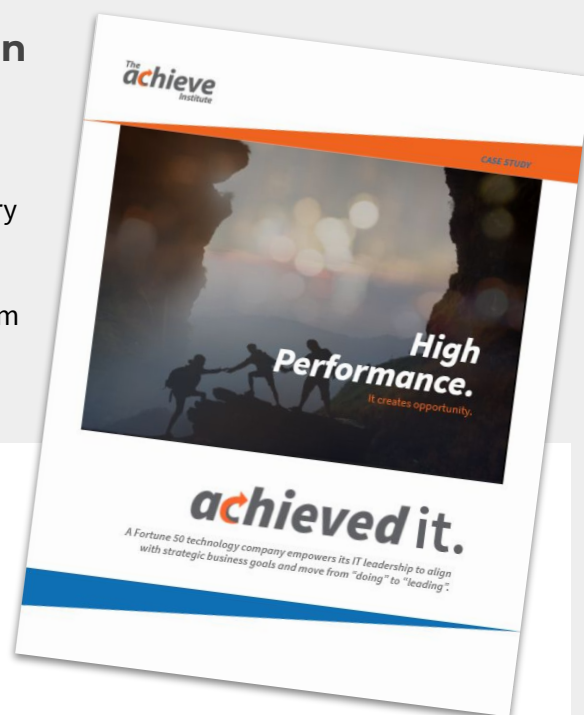
APPLICATION ROADMAP

1

The CIO and leadership team were good at doing what they had always done. Which made them even more resistant to doing things they had never done before.

Using the tools of the Achieve System's **Operating Framework**, these senior leaders were able to examine and manage the internal and cultural factors that influence the ability of all people and teams to perform: our identities, relationships, worldview, beliefs, habits, emotions and other behavioral drivers.

As the team became more grounded, their confidence in their ability to contribute strategically grew. But transformation requires building a new normal - creating new habits, not just new mindsets. The entire IT department needed to update to a new default mode - a new way of thinking and working on a daily basis. And the leaders needed to bring all their people along.

Adding to the challenge was the dynamic nature of the organization itself: as the CIO noted "There is constant change and frequent job rotations within my organization and among our leaders."

2

The team was ready to tackle the work that would ignite its most powerful transformation: creating a **Point B**.

These IT leaders had realized early on that they never thought much about what future "success" as a strategic IT department would look like. They had been exclusively focused on hitting their business plan targets - and this had become the team's default approach: follow the plan until we check all the boxes.

By moving toward a clearly defined destination of what success looked like, the team created solutions never considered before. The to ensure the investment in the leadership was equally an investment in the entire organization, the team applied two of the most powerful tools in the Achieve System methodology: **Create, Don't Fix** and **Connect to Possibility**.

As completion of the 6-month engagement neared, the team recognized another advantage gained: they now had a common language as well as a common framework to help drive daily peak performance.

BACK TO OVERVIEW

*We had a real leadership gap. The **Achieve System™** helped elevate the way we were thinking about our opportunities and challenges."*

POINT A

Before the *Achieve System™*: the network CIO at a Fortune 100 technology company knew his IT organization was very good at fixing situational problems. But it was not good at creating better solutions. Until now, action and execution – not innovation and leadership – had been IT's top priority. Now there was an urgent need for IT to better align with strategic goals and for IT leaders to be drivers of innovation and productivity.

POINT B

After the *Achieve System™*: the CIO reported a sea change across the entire IT department, with his leadership team becoming more focused and innovative, bringing proactive solutions to corporate leadership that they wouldn't have otherwise developed. The department also now has a common language and common framework that they work within every day to sustain elevated performance.

Bottom line results?

The IT department transforms from a tactical execution group to an innovative strategic asset for the company, led by leaders able to envision and create new, better solutions.

Results Highlights

The IT department developed a a demonstrated ability to ramp up faster, be more agile in its performance and proactively develop strategic IT solutions aligned with enterprise goals

The CIO saw multiple leadership development benefits: IT is now a stronger corporate leader as a group, and each leader within the group is stronger individually

Historically challenged by constant change; the IT department leaders now have a greater ability to adapt quickly and accelerate both solutions and actions

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A time to pivot.

As IT has become increasingly critical to the success of virtually every department within every enterprise, CIOs today are being challenged to strategically adjust or pivot their departments and take on strategic and leadership roles within their companies.

This was the case at a Fortune 100 technology company, where the CIO was tasked with helping her department and leadership team step into strategic roles that would drive innovation and move the company forward.

 "*Historically, we have been known for being masters at taking massive action and execution*." said the CIO. "*As good as we were at getting things done, we had a real leadership gap*."

Further complicating the problem was the frequent job rotations that were common within the department. The CIO in particular wanted to make an investment in the leadership team that would elevate the way they were thinking about opportunities and challenges, regardless of their current role or their fast-changing environment.

Strategic thinking unleashed.

The *Achieve System™* proved to be an ideal methodology to help the IT leadership team think more strategically.

Because the department's corporate role had always been to *fix* institution problems, they had never had much opportunity to develop the muscle memory necessary to strategically *create* new solutions instead.

Operating
framework

"This was an investment in my team and my organization. However, it was also an investment in each individual leader.

"We grew as a team, but we grew individually as well. Incrementally, I'm watching them grow as individuals AND as a team."

The system's proprietary **Point B** work requires that leaders develop a detailed picture of what a success outcome would look like. This proved especially powerful.

"We were not thinking about what success looks like," explained the CIO. *"We were focusing instead on the targets in our business plan."*

Achieving high performance as a group and as individuals.

By moving toward a clearly defined destination of what success looked like for their customers and employees, the IT leadership team began coming up with creative solutions that had never even been imagined before.

The CIO was equally excited about the overall performance benefits.

*"We now have a common language and a common framework that we use every day to elevate our overall performance and attain top results. The **Achieve System™** has helped my leaders ramp up faster and be more agile."*

The CIO considers her investment in the team to be an unqualified success that will have lasting results: not only did she develop the leadership abilities of her team as a whole, she grew the leadership skills of each individual leader as well.

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The **Achieve System™** is a proprietary methodology that helps you achieve, sustain and scale high performance.

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