



## SUCCESS STORY: Retirement Association



# The Client

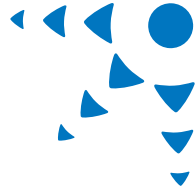
The client is a municipal employee's retirement association located in the San Francisco Bay area. They provide retirement, disability, and death benefits to the employees, retirees, and former employees of their county.



# Need / Challenge

The client, with approximately 100 employees was experiencing low morale, a lack of clarity, and employees dreaded coming to work: turnover was near 30%, unusually high for a public agency. While most employees trusted their immediate managers, most perceived a top-down decision-making process at the Executive level, exhibited by a lack of transparency in decisions, and lack of follow-up on employee concerns. Chronic frustration was exhibited in disrespectful behavior and lack of cross-functional collaboration. Several management consultants were engaged over the prior five years to address the problems, but this resulted in little change and a generally cynical attitude toward business consultants.





# Solution: What Clarity Did

Clarity's consultant was a specialist with extensive talent and organization development expertise. The agency's Executive Leadership Team initially expected Clarity to train employees in the organization's Core Values. Realizing that success required a departure from past practice, Clarity's consultant proposed a new approach, blending best practices in organization design and team effectiveness. Clarity's consultant identified three primary challenges:

- Core Values: There were too many core values and they lacked measurable definitions of success.
- Leadership: The Executive Leadership Team lacked key elements of a high performing team: trust, collaboration and respect.
- Organizational Readiness: Mid-level managers and staff members were not open to a leader-led initiative to which they had no input.



# Solution: What Clarity Did

Working with the Executive Leadership Team was the first priority. Using the Myers-Briggs Type Indicator and the principles of Patrick Lencioni's Five Dysfunctions of a Team, Clarity's consultant worked with them to align Core Values to their organizational needs—paring down the number of values and drafting clear definitions of each—along with effective communication and change management strategies. Meanwhile, using an empathetic, non-judgmental approach, Clarity's consultant completed an organizational assessment including interviews with employees and managers to understand their concerns: critical to defining Core Values and a change management plan. Both management groups were brought together for a consensus-building session. Clarity's consultant led the teams through a collaborative process, modeling the behaviors of a mature, effective business.



# Results: **The Outcomes**

Employee engagement was critical to the success of the project. Employees were invited to provide input and have their questions answered. Committees were formed for each Core Value to ensure the desired behavior was modeled throughout the organization, and to address concerns from people at all levels. Eight months later, the agency is enjoying continued success. As Clarity's consultant stated: "The business is not successful unless individuals are successful and satisfied." For this organization, collaboratively defining meaningful, measurable Core Values was a foundational element to achieving a healthy work environment.



## Breakouts: **Quotes From Consultant**

"Being an executive consultant means that I don't come in with answers and I'm not a problem solver. I need to understand what people are feeling, to respect that, and not assign any judgment to those feelings."

"The business is not successful unless individuals are successful and satisfied."

ABOUT



**clarity**  
CONSULTANTS

Clarity has over a quarter century of expertise in placing elite learning and development professionals in high-demand positions in large, global organizations.

There is a reason why over eighty percent of Fortune 500 firms rely on Clarity to staff their projects. Our background, skilled consultants, and broad range of experience across industries and sectors help set us apart from the competition.

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