

Case Study: Leadership Team Merger



A global household brand acquired three smaller companies in a specific product space and began merging them under one new brand.

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The Leadership Team Merger

Summary

A large household brand acquired three smaller companies in a specific product space and began combining them under one new brand. We were asked to support the new, extended leadership team with building relationships and creating a sense of cohesion.

The Challenge

Having acquired 3 companies in adjacent product spaces, our client had recently begun investing the time and energy needed to bring these companies together under their common umbrella.

There was a real drive to coalesce around mutual goals and shared needs and our client knew this process had to start with the organization's leaders. As one executive put it...

"What is most needed is to have confidence that people from across the organization know (and feel like they can speak with) each other. This means building a sense of community amongst the extended set of managers including establishing stronger conventions for communication."

Additionally, a recent culture survey had revealed that individual managers wanted to feel closer to the executive leadership team. In particular, they craved a greater sense of transparency in order to combat the sense that leadership was operating in an overly 'top-down' manner.

By the time they contacted us, the company had already planned to gather together all 35 managers from across the newly-formed organization but were feeling uncertain about how best to use the time. They knew they needed something that would kickstart the connections and camaraderie essential in the months ahead.

The Proposal

We proposed a half-day Connection & Cohesion workshop comprising...

- Activities that would allow the team to get to know each other as people.
- Exploration of their shared mission and what that mission meant to each individual, personally.
- A shared challenge over which they could bond.
- The creation of a shared backlog of leadership and collaboration opportunities the community of managers could own and drive.

The Runway

We began with a survey of leaders designed to give us a nuanced understanding of the day-to-day experience and challenges of leading in their environment.

When we analyzed the survey data, a few shared challenge areas emerged. These included...

- Prioritization and customer focus
- Talent retention
- Roles and responsibilities
- Feedback
- etc...

For each area, we compiled a list of their answers that particularly illustrated the challenges at play.

For example, on the topics of feedback and psychological safety, we extracted content like...

- Does the fact that we're a nice team mean that we sometimes fear that speaking-up will create personal conflict?
- There doesn't always seem to be the space to raise dissenting opinions - possibly a symptom of moving so fast.
- There seems to be a lack of follow-up on sprint retro items.

Then we worked with the sponsors to discuss how the group might begin to tackle some of the concerns.

As a result, we recommended that the first workshop be a session for exploring the problem areas and breaking down the challenges into bite-sized pieces. We believed that collaborating over these more manageably-sized, shared challenges would allow the group to connect and build trust. Additionally, learning about each other's methodologies and approaches was valuable for cross-pollination of ideas.

We understood that there had been very little cross-team collaboration or connection in the past. To help alleviate the lack of personal familiarity across the group, before the workshop, we had them create a collage about themselves using a collaborative digital whiteboard tool. Consequently, by the time we started the first workshop, the group had spent around 2 weeks co-creating a shared picture of their personalities, interests and individuality.

We were confident that this preparation work would create enough initial connection that we would be able to use the shared challenge work to build relationships organically. Rather than focusing on 'getting to know each other' we focused on 'solving problems together' and trusted that the camaraderie and closeness would emerge as a byproduct.

"I loved the opportunity to have thoughtfully guided conversations with fellow team members who I'd not previously met. You made the introductions and sharing feel natural and welcomed."

The Takeoff

The workshop itself was centered around a highly customized blend of two Liberating Structures: [Troika Consulting](#) and [Shift & Share](#). We interspersed this central exercise with carefully chosen games to keep the group open, energized and able to concentrate.

The main exercise's design had three principal advantages...

- Small teams could easily be formed around shared challenges.
- Those teams could gather detailed feedback from the larger group at speed and at scale.
- The rotating nature of the process increased the number of people each individual met over the course of the session (furthering the goal of increasing familiarity and connection amongst the team).

The challenge areas each team worked on were composed of a large collection of specific problems. We supplied particular ideation and creativity tools to help groups refine the set of problems into a key problem statement and to generate potential solutions.

Once the team had a clearly articulated problem and some ideas on how to solve it, the whole-group feedback process began. This was, by far, the highest-energy part of the process as the rapid pace created a productive intensity that the group clearly enjoyed.

Finally, with feedback gathered, the teams formulated action plans based on everything they'd heard.

By the end of the session, the teams were buzzing with ideas and they each had specific actions to take away and own.

The Landing

It was immediately apparent that the teams were leaving the session deeply motivated to attack the problems they'd been exploring. The plans that emerged included...

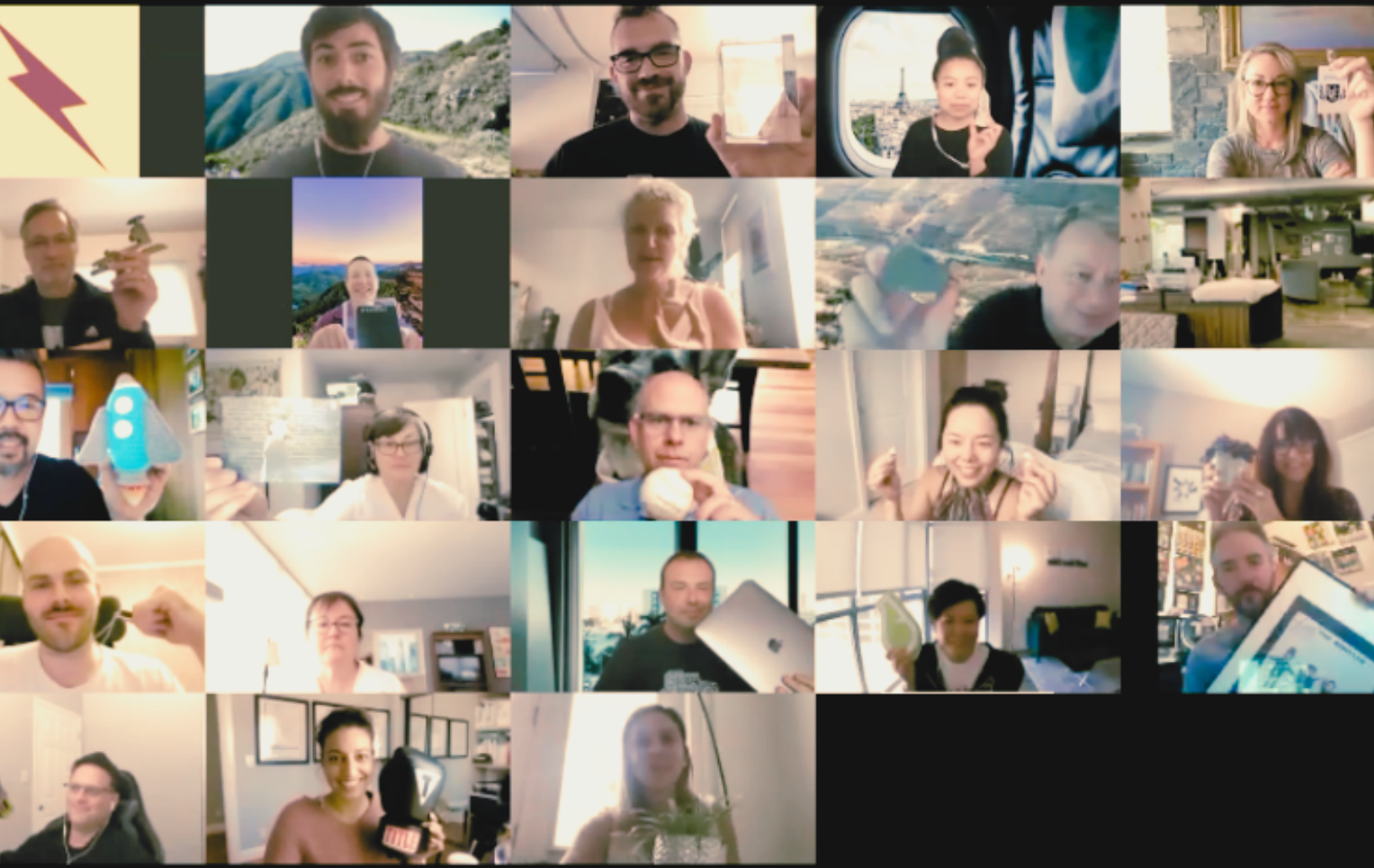
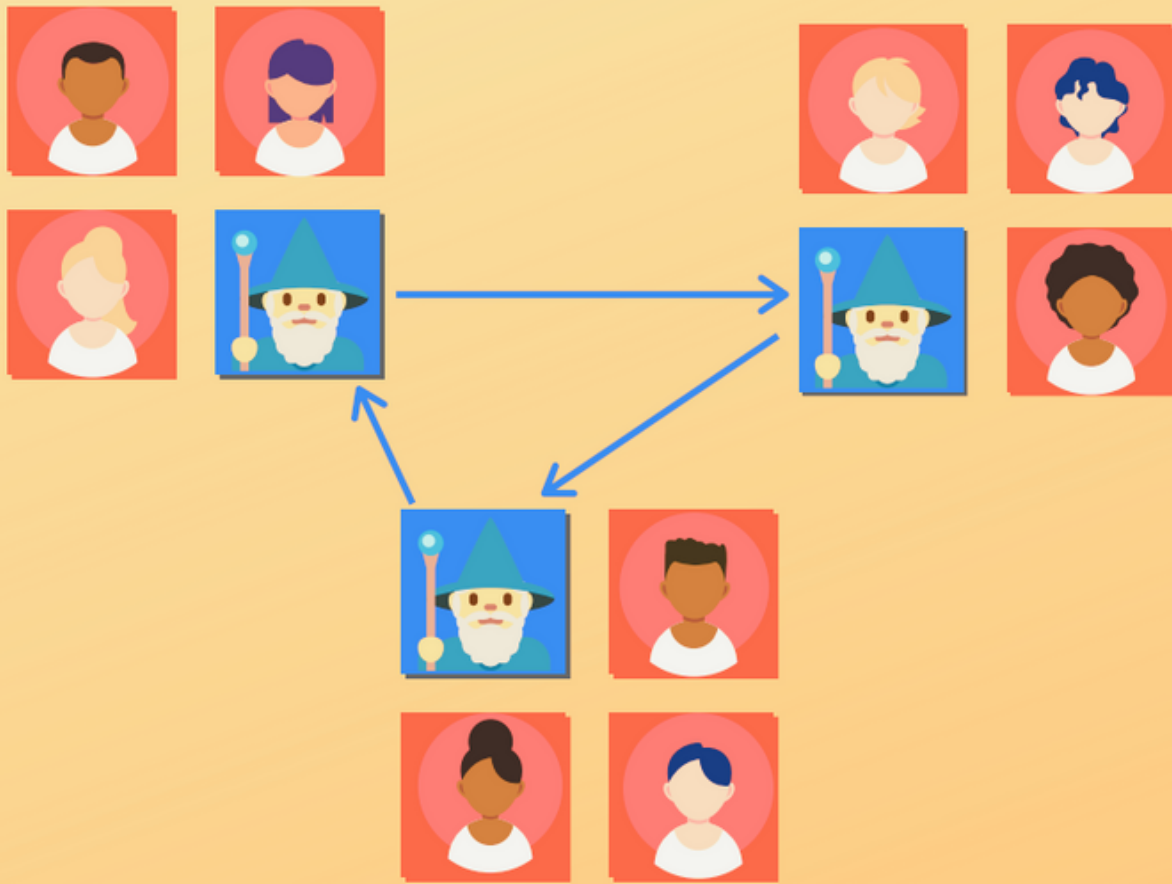
- The creation of a gratitude-specific Slack channel.
- The rollout of clearer onboarding steps for new colleagues.
- The introduction of check-in prompts (aka icebreakers) in common meetings.
- The creation of 'stretch assignments' to help challenge and retain strong talent.
- The rollout of a 'coffee-roulette' system for fostering random encounters (this was prior to the days of the 'Donut' app!).
- The production of a more nuanced set of thinking about the mix of 'doers' and 'innovators' being recruited.
- A deep dive into defining effective meetings within the organization.
- And so many more...

Multiple team members commented that they felt a new confidence to reach out to each other for help in the future.

"I really feel like I understand the other leaders so much better and could approach them with challenges I'm experiencing."

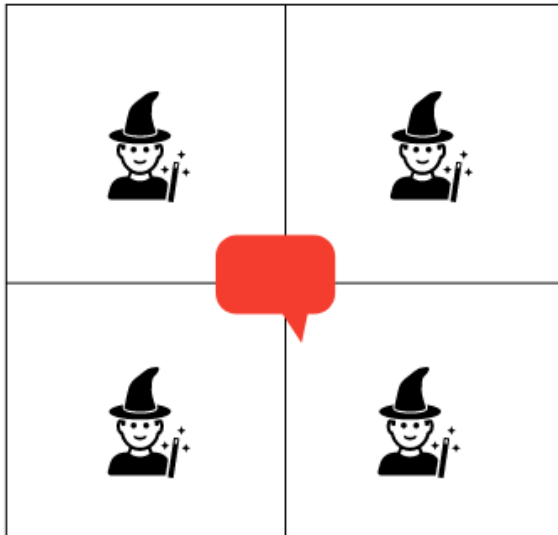
They also felt extremely positive about the unity and sense of togetherness that had emerged from the session. As one leader put it...

"A great outcome of this day was the strong alignment that was built over the sessions."

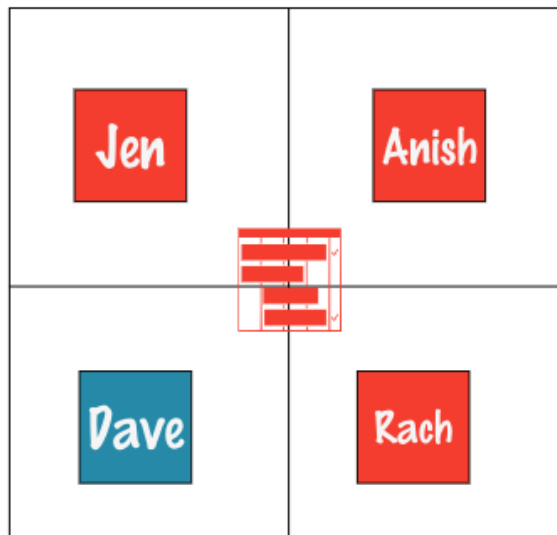


Shared Challenges

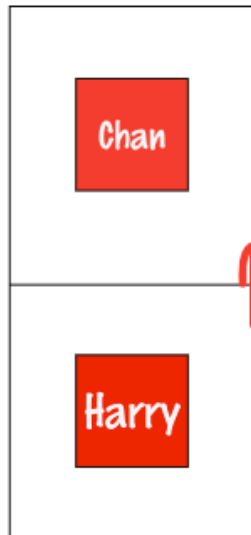
Communication / Productivity Tools



Project Management



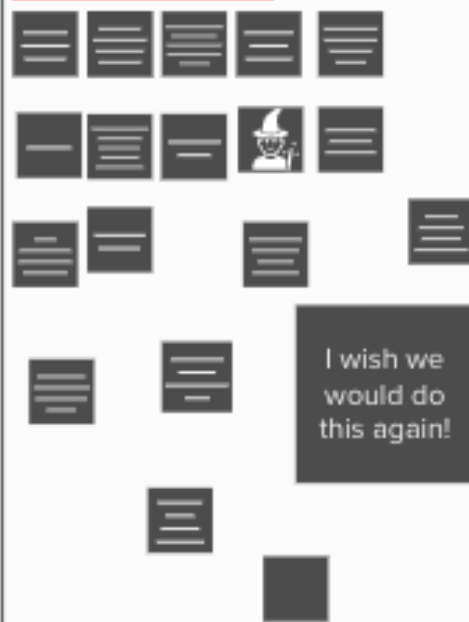
Prioritization / C



I LIKED



I WIZARD



I WILL

