

CUNA Mutual's Change Transition

Case Study

The business need

Change requires a transition – a reorientation that people need to go through before change can work. CUNA Mutual Group, the leading provider of financial services to credit unions and their members, had recently appointed a new CEO and senior team and were in the process of transforming the company at lightning speed. In communicating the business case for change, and due to a transformation in the Sales organization, the executives in that area recognized the need to understand how people react to change. They wanted to help the team assess where they were on a continuum of the stages in change. Most important, they wanted to provide tools and techniques to the Sales team to help them move through change as quickly as possible.

Although the Sales team initially raised the need, everyone's role was affected in the transition. This was more than just a sales initiative – the whole company was experiencing change, so the solution had to be all-inclusive.

The solution

Leaders at CUNA Mutual partnered with Root to develop a *Strategic Learning Map*[®] module called “The Transition Highway.” Through a visual depiction and group exercises, they led people on a journey to see what change meant at a personal level. The visual element represented the three aspects of the “change curve” that all people move through: letting go, navigating, and building commitment. Through discussion and discovery, people could internalize the concepts and identify what they could do to help each other move through the change process more effectively. A critical aspect of the experience was the opportunity to apply knowledge through scenarios on communicating change, identifying where people were on the change curve, and considering appropriate leadership actions. An action-planning template gave managers a simple tool to use in preparation for their change initiatives.

Implementation

All officers and HR Generalists experienced the module as participants and then attended a train-the-trainer session. Officers facilitated the sessions with managers, and then managers were trained to cascade the learning to their direct reports. The module was built to be flexible, so managers could customize the content.



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Results

The experience brought outstanding feedback. “Most participants said we should have done this sooner,” said Jennifer Kloeping, a Senior Learning Consultant for CUNA Mutual Group. “The program allowed people to have candid conversations about change and gave them all an opportunity to share their perspectives. Participants realized that even though they weren’t in the same place in transition, they could still have meaningful discussions about the impact of the changes and how they could help each other move toward acceptance and drive the business forward.”

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About Root

Root is a strategy execution company that helps organizations engage people as a catalyst for change using a proven framework that consistently achieves clarity, ownership, and results.

