



## Case Study

**Sector:** Finance

**Assignment:** Establishment of Core Values & Core Purpose to Accelerate Growth & Performance.

**Period:** 2008

### Background:

A Limited Company in the financial services sector advising on & managing financial & tax matters to the self-employed.

The appointment of a new Managing Director & the establishment of a new senior management team acted as the catalyst for the organisation to review their values, working behaviours & attitudes in order to facilitate greater cohesion within the workforce & to deliver an acceleration of growth & performance.

### Assignment:

- To establish with the senior management team the core values & core purpose of the organisation to increase cohesion within the workforce
- To align the young & rapidly increasing numbers in the workforce behind the core values & with core purpose to deliver continuity in handling client relationships
- To use the agreed values & core purpose to reinforce the organisation's market positioning, facilitate discussion around internal & external brand creative & communication territories, & their application to potential marketing & communications messaging
- To facilitate the use of core values, core purpose, & agreed creative & communication territories to assist in:
  - The acceleration of underwriting new business
  - The development of increased continuity in managing client relationships
  - To increase market share
  - To increase turnover & profitability
  - To increase the profile of the brand

### Methodologies:

Use of an organisation wide values assessment instrument to assess commonality & alignments of values within the management team & the workforce

- Workshops
- Feedback loops

### Outcomes:

Over a period of approximately six weeks the organisation reached agreement on core values, core purpose, & a clear understanding of how they could be immediately applied to the organisation at management, procedural, brand, & client relationship levels.

The organisation continues to underwrite considerable levels of new business; it continues to build marketshare, & is using its core values to support its marketing & communication activities that are helping to drive continued business expansion.