



CREATING A CULTURE OF PERFORMANCE AND ACCOUNTABILITY



INTRODUCTION

A Midwest insurance and professional services firm was challenged with implementing an upcoming strategy because of its lack of unit-level plans. Partnering with **Bâton Global (B|G)**, they established a strategic planning system focused on a hierarchy of high-level initiatives and unit-level plans that aim to cultivate a performance-oriented culture.



THE STORY

This financial services firm headquartered in the heart of the Midwest is committed to delivering financial dignity to its clients. Guided by its principles of excellence, it is dedicated to fostering opportunity and innovation to meet the ever-changing needs and goals of retirement.



THE CHALLENGE

The company faced a dilemma as it concluded a three-year strategic plan without a clear implementation strategy. This lack of unit-level plans hindered goal accomplishment and effective strategic execution.



THE CHOICE

Collaborating with **B|G**, the company adopted a strategic planning system. Insights from existing strategies, "Think Big" sessions, and organizational culture enhancements propelled the creation of three high-level initiatives. This innovative approach steered the firm toward a performance-driven culture and robust strategic processes, empowering emerging leaders and successfully implementing key initiatives like "Vision, Mission, and Values."

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A Midwest insurance and professional services company nearing the end of a three-year strategic plan was uncertain about its implementation and unit-level Collaborating with **Bâton Global (B|G)**, they formulated a strategic planning system that consisted of high-level initiatives that cascaded into unit-level plans. With goals and metrics in alignment, they could foster a culture of performance and accountability.

The Insight phase unveiled challenges and future aspirations through examining existing strategies, conducting interviews, and discussions with leadership. Group exercises encouraged innovative ideas, which culminated in three high-level initiatives.

The Innovation phase focused on cultivating a "Think Big" culture, steering the firm toward a dynamic strategy process instead of status quo acceptance.

The initiatives received senior management approval in the Integration phase, leading to goal alignment across units. Leadership development sessions and board presentations also solidified the new strategic infrastructure.

The project's impact surpassed expectations. It fostered a high-performance culture, elevated emerging leaders, and successfully implemented key initiatives, most notably "Vision, Mission, and Values," transforming the organization's trajectory.

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Working with many organizations, Bâton Global has raised the bar on what to expect from consulting firms.

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LET BÂTON GLOBAL
HELP YOU DESIGN A STRATEGY
THAT ACHIEVES YOUR GOALS.



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