



USING PREDICTIVE INDEX TO STRENGTHEN STRATEGIC PLANNING



INTRODUCTION

A specialty property and casualty insurance company partnered with **Bâton Global (B|G)** to strengthen leadership alignment and support business planning during a period of change. The engagement brought together **B|G's** expertise in strategy, leadership, and organizational performance.



THE STORY

As the company defined its future direction, its leaders recognized that achieving their shared vision would require an executive team equipped to collaborate effectively. How leaders communicated, made decisions, and worked through different perspectives would be critical to moving that vision forward.



THE CHALLENGE

Leaders needed greater awareness of their own behavioral tendencies, how colleagues experienced them, and how those dynamics could affect their work together. They also needed a practical way to apply that understanding within the business-planning process.



THE CHOICE

B|G introduced Predictive Index (PI) and helped the executive team translate behavioral insights into action. Leaders explored their individual and relationship profiles, while **B|G** used the findings to create behaviorally diverse planning groups and equip facilitators with targeted prompts. This integrated approach encouraged leaders to examine their natural tendencies, consider different perspectives, and strengthen the business-planning process.



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A specialty property and casualty insurance company engaged **Bâton Global (B|G)** to support leadership alignment and business planning during a period of organizational change. As leaders clarified the company's future direction, they recognized that success would depend not only on where the organization was going, but also on how effectively its executive team worked together.

Having helped the company articulate its aspirations, **B|G** recognized that strategy depends on people working together to advance a shared vision. The next challenge was helping leaders understand themselves and one another well enough to move that vision forward. **B|G** introduced Predictive Index (PI) to connect leadership insight directly to the planning process.

Using PI, **B|G** guided leaders in understanding their behavioral patterns, how others were likely to perceive them, and how they could manage that impact more deliberately. Access to relationship tools immediately sparked curiosity as participants compared profiles and explored how they worked together.

B|G then incorporated the PI insights into the company's business-planning sessions, creating behaviorally diverse groups and equipping facilitators with prompts that encouraged leaders to examine their usual approaches and consider a broader range of perspectives. This application encouraged leaders to recognize and challenge their natural tendencies, helping strengthen the discussions and outputs of the business-planning process.

PI gave the team an opportunity to pause and "look in the mirror," building greater awareness of their behavioral tendencies and how those tendencies could influence their work together. **B|G** then translated that awareness into practical tools that strengthened the business-planning process.

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Predictive Index helped me understand why I may be perceived differently by others and how those differences can affect communication.

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



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