

enterprise transformation

challenge

One of the largest mortgage banks in the United States found it was at a plateau, unable to continue growing effectively. Organic change over the last decade had led to inefficient processes and misaligned resources across more than 20 offices. Further growth was choked by internal friction and lack of clarity on how to make profitable investments.

solution

Creating consistency required adapting the enterprise vision to the unique culture and circumstances of each local office. This mediation was accomplished by two parallel initiatives:

- **Enterprise Operations Manual.** Cory led a team of writers and editors to create the bank's new operations manual, including sections on Mission & Vision, Organizational Structure, Processes, Metrics, Technology, Compliance, Sales Management, and Marketing. The manual was distributed as each section was completed using an internal publication platform supporting comments, voting, and tracking all changes. Cory and David assisted each team as they reconfigured existing resources to align with the standards set by the manual.
- **Leadership Coaching.** David and Cory established a coaching program for leaders in the bank. Starting with the 300-person sales force, this initiative included rolling out coursework for managers, a new sales metrics package, development of standardized scripts and forms for sales, visits to every branch, observations and analysis of more than 20 coaching sessions, tracking the progress of coached vs. non-coached sales officers, and making continuous improvements to the program once launched. Through the coaching program, local adaptations to the enterprise vision were documented and incorporated. Establishing the coaching practice in the sales organization provided substantial momentum to bring the same cultural changes to all other parts of the organization.

benefit

The bank opened its first new branch office in nearly 4 years after the coaching program was established, and is on track to become a \$4 billion institution. Through new management techniques and the creation of metrics-based tools that support objective accountability, it has transitioned to a data- and analytics-driven organization where employees are empowered through transparent access to standardized assessment criteria and their own real-time performance metrics.

