



**vivo**  
team development

## CASE STUDY

Developing leaders to support sustainability during rapid growth and acquisition.

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*"I appreciate Vivo Team for learning our business and helping adapt the program as it relates to what we face."*

*- Rick Hanna, Regional Sales Manager Atlantic Canada, SureWerx™*



## Vivo Team & SureWerx™ Brandon Hall Gold Award: Best Advance in Measuring the Impact of Leadership Development



### COMPANY BACKGROUND

SureWerx™ is a leading supplier of professional tools, equipment, and safety products for workers and have been named one of Canada's 50 Best Managed Gold Standard Companies four years running (2016-2019). Co-headquartered in Vancouver, British Columbia and Elgin, Illinois, SureWerx™ offers unparalleled access to its brands through its partner distributor network, servicing the industrial, construction, safety, and automotive aftermarket in North America.

**INDUSTRY:**

Distributor  
Machinery Manufacturing

**SOLUTIONS:**

People Analytics: Vital Statistics Report™  
Leadership Development Program  
Executive Coaching Sessions


### CHALLENGES

Succession was a major challenge for this rapidly growing wholesale distributor who was in the midst of several international acquisitions.

Other challenges included:

- Dealing with legacy issues since the 2012 purchase of the company by the Penfold Venture Capital Group from a family-owned business established in 1957
- Leaders and managers were busy and overextended from driving to increase revenues after a few years of disappointing results and many frequently travel internationally to suppliers and customers
- Managers were having difficulties influencing legacy employees to increase accountability and move into a more digitally oriented business model

SureWerx™ made a commitment to their senior™ and high-potential leaders to support the growth and sustainability of the company. The Executive Team decided that it was in the company's best interest to develop their leaders, which would support achieving corporate goals and reporting with ease to their stakeholders.



***“The sessions are spread out to integrate learning into our daily work flow. As a new manager, Vivo Team’s Leadership Program has given me the unconscious permission and confidence to be a manager and a leader.”***

*- Chantell Olivier, Marketing Production Manager, SureWerx™*

## APPROACH

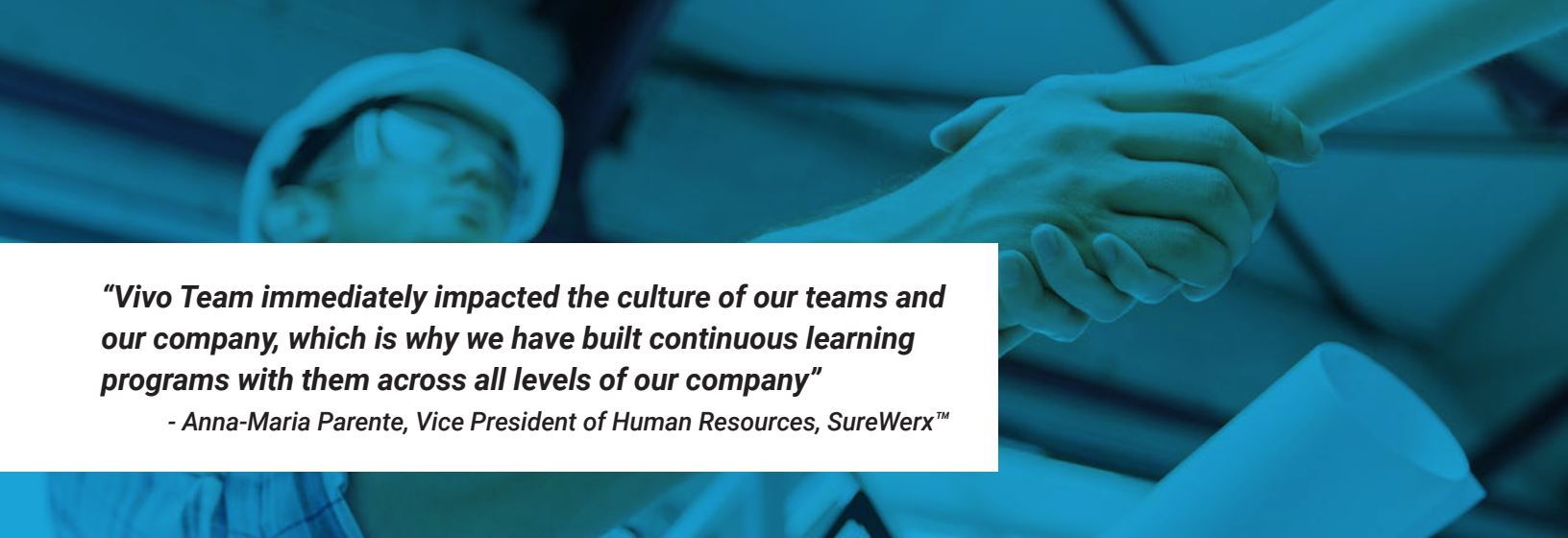
SureWerx™ engaged Vivo Team to design a solution that would facilitate three desired shifts:

1. A **cognitive shift** from a fixed mindset of *“this is how we do things around here”* to a growth mindset of *“let’s work together to find a better way.”*
2. A **behavioral shift** to positive, behaviorally-based changes for improvements that save time, save money, and make money while experiencing more personal and career satisfaction.
3. An **emotional shift** that promoted behavioral intelligence based on emotional intelligence. *“You may feel like doing something, but is that going to result in the best outcome? You have to consider the effects of your behaviors on others.”*

### VITAL STATISTICS REPORT™ (VSR™)

The VSR™ anonymously measures how well team members and their leader are functioning together in six key indicators of highly functioning teams: Communication; Accountability; Feedback & Feedforward; Structures; Emotional Intelligence; and Cohesion. Within each of those six key indicators are measures of Competence, Motivation, and Collaboration.

The data also yields an evaluation of the Leader Behaviors Gap, the differences in perception about what the leader thinks they are doing and what their team members see them doing, in the key leader behaviors that affect team performance. This data forms part of the basis for the coaching sessions so that the leader can improve.



***“Vivo Team immediately impacted the culture of our teams and our company, which is why we have built continuous learning programs with them across all levels of our company”***

*- Anna-Maria Parente, Vice President of Human Resources, SureWerx™*

## **LEADERSHIP DEVELOPMENT PROGRAM**

Based on the results of all VSR™ data, live, virtual instructor-led training was delivered in interleaving segments (60-minutes per session) over seven months to the Executive Team in 2017. This was followed by an additional leadership development program delivered over 16 weeks in 2018 to high-potential leaders.

The topics included: How Smart Leaders Bring Out the Genius in People, Diagnosing Competence and Motivation, Matching Leader Style to Competence and Motivation Levels, and Accountability: The Skill and Will of Getting Things Done.

Each online learning session was supported with a Play of the Day (brief summary learning cues to help participants refer to, retain, share and apply new learnings on the job to support retention and application to the workplace).

## **COACHING SESSIONS**

1-to-2 coaching is two coachees working with an executive coach in 60-minute sessions. During the session each coachee gets a 30-minute personalized coaching event while the other coachee observes. The roles are then switched. This technique deepens and accelerates the learning experience so people can easily apply those learnings into their work situations (a process referred to as double-loop learning).

Leaders with cross-departmental or different geographical areas can share ideas and gain key insights into how the organization works. Additionally, by observing their colleagues being coached, they learn how to coach their own team members.

Over the course of the 1-to-2 coaching sessions, SureWerx™ encouraged leaders to share learnings during and after the completion of the program. The benefit is that leaders will have a colleague to share the ups and downs of team and work situations.

***“Vivo Team’s powerful approach has enabled us to build a new accountability culture where managers are connected and informed.”***

*- Clive Shephard, GM/VP EMEA Region, SureWerx™*

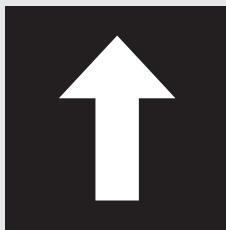
## RESULTS

After completing the program a VSR™ was again deployed to participants. In reviewing the new VSR™ results leaders can see the behaviorally-based changes and the ROI in dollars as a result of the training as well as areas that continue to need more improvement.

### EXECUTIVE TEAM

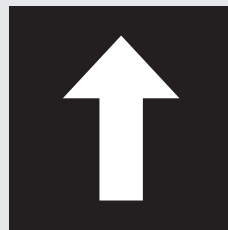
From September 2017 to March 2018 shows:

- A recovery of the Cost of Lost Productivity of \$104,286
- An increase in team efficiency by 14% (from 57% to 65%) as measured in the six key indicators of Communication, Emotional Intelligence, Accountability, Feedback & Feedforward, Structures, and Cohesion
- Led to an ROI of 160.8%



**\$104,286**

RECLAIMED



**14%**

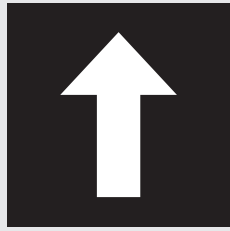
Team Efficiency

**ROI =  
160.8%**

### HIGH-POTENTIAL LEADERS

The measurements of ROI, behavioral changes, and Leader Behaviors Gap are more complicated than seen with the Executive Team because there are multiple leaders with distributed team members across Canada and the US.

**7 of 9 teams showed a DECREASE in the Cost of Lost Productivity.**

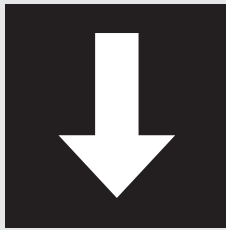


**\$92,980**

RECLAIMED



**2 of 9 teams showed an INCREASE in the Cost of Lost Productivity.**



**\$37,770**

Cost of Lost Productivity

*The analytics allowed SureWerx™ to identify what was going on with the two teams in the minus range and implement interventions. In both instances the issues revolved around underdeveloped team members combined with a newly appointed leader not being up-skilled on leading a distributed team. SureWerx™ HR and next level VPs were able to turn these situations around and prevent those leaders from becoming failed “accidental leaders.”*

## **BENCHMARKS FOR SUCCESS**

SureWerx™ has been able to engage their dispersed managers in a live, virtual facilitated leadership development program after some initial skepticism on the managers' part. While there was initial anxiety by the managers about participating in the 1-to-2 coaching, every manager has expressed what a positive experience it was to learn about their colleagues' challenges and successes. The graduated managers from program one moved onto program two (12-weeks) in the spring of 2019 to continue their leadership training.

## **NEXT STEPS**

SureWerx™ has committed to ongoing, continuous learning experiences with virtual instructor-led training, individual and group coaching, behavioral analytics, and access to Vivo Team's learning experience platform. The HR team has integrated the Vital Statistics Report™ analytics into the leader's personal performance plan and career development at SureWerx™.