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Visions of success

Can a team culture turn your business around?

Mary Lovell
7side Limited

‘We want to attract and retain stars and minimize micromanagement.’

Abstract

Describes how applying all the principles of a new foundation is driving the growth of the company formation and information business 7Side. Explains how a dramatic culture change has created a vibrant and fun working environment and improved staff retention. Suggests that all staff buy into the company’s values and vision and that this has evinced better service delivery to its customers and created new revenue streams. Gives a view of a company that transformed from a ‘family run’ firm to a progressive, successful organization punching above its weight in the marketplace. Describes how the vision, mission culture, values and infrastructure were designed and applied.

Keywords: 7Side, change management, communications, Companies Act Property Search Services, Company Incorporation, corporate culture, Corporate Information, cost recovery and research analysis, culture covenant, foundation, infrastructure, mission, policy, procedure, property transactions, roadmap, system, team culture, values, vision, Vistage

Introduction

Our sound foundation will form the basis for our healthy future. Living by our Mission, following our Vision, adhering to our Culture and Values is our road map for the future and for fulfilling our audacious goals.

The last four years at 7Side have seen a significant transformation – with more change to come. A new company name, a change of board and a complete re-evaluation of our culture, identity and values have put us in a perfect position to gain from any opportunities the future has to offer.

The core services of 7Side include the provision of corporate information, company incorporation and property search services with some unique cost recovery and customized features. We currently employ around 40 staff and during my period in office as a director we have experienced a healthy

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consolidated growth of around 25 per cent. There are tremendous opportunities ahead with the imminent legislative changes relating to property transactions due to take effect in June, together with new processes that the Companies Act will bring. We are predicting a catalytic growth in our business.

Managing that growth will be a challenge in itself, and we have made every practical and theoretical effort to effect a smooth transition. Our sound foundation will form the basis for our healthy future. Living by our Mission, following our Vision, adhering to our Culture and Values is our road map for the future and for fulfilling our audacious goals. Where I make reference to the word 'our' this is meant as total inclusion of everyone within our organization.

If this sounds like an evangelical rant perhaps I should share our experience of how our company has transformed since we revisited the basics. I am, myself, a converted cynic.

History

Our company has been in existence for 27 years, trading for the first 23 years as a partnership, Severnside Company Services. We then converted to limited status and renamed ourselves 7Side Limited, with a refreshed branding and some changes in ownership and principal officers. The majority of our customers are professionals within the legal, accountancy and banking sectors.

Growth for the first two decades was steady and the business sustained a significant place in the market. This was largely due to exceptional customer service, together with a very professional approach, and assurance of thoroughly accurate content in the delivery of all instructions, these being the most desired requisites during that era.

With the advent of technology all former business practices were revolutionized and a great deal of our traditional competitor pool changed. Many SMEs in the corporate information and incorporation world fell foul of a business now dominated by the commercial giants, who were in a position to buy up entire databases and create sophisticated systems for electronic information delivery and incorporation processes.

The drive to embrace and apply new technologies was championed by two partners of the old Severnside firm: a former manager, who is now a director, as well as

myself in my previous role of Business Development Manager. Due to the rather traditional, cautious approach of the senior partner some resistance was met. All proposals to invest in new technologies, to allocate a marketing budget and other funds to promote the business, to invest in refreshing the company's image were seen as 'non-critical', and were either rejected or took disproportionate efforts to get sanctioned. It could be argued that the 'partnership mentality' of a minority of senior decision-making partners had more to do with protection of equity than looking to the future.

We persevered, however, and our tenacious efforts enabled us to provide electronic delivery of documents, plus other unique and innovative features to meet the growing demand for web-based business transactions. This included Internet order systems for corporate document images and reports customized to client requirements. We also pioneered electronic incorporation software, totally compatible with Companies House e-formation and client email systems and processes. Our property search division client offering was enhanced by offering a single source solution for property search requirements.

The structure was a two-tier system, with partners making the decisions, staff acting totally under their guidance and very little middle management autonomy. As in many long-established firms, staff would be promoted to supervisory roles purely on the basis of length of service, or product and operational experience. The absence of a policy where staff could contribute to business planning and hone management skills training manifested itself in a relaxed approach. The old culture bred an expectation that strategy, innovation and development was purely in the hands of the partners and that there was no need for employees to lead change practices. The majority of the staff had little understanding for the critical need to apply dynamic changes to survive in the new technology-driven business world.

On retirement of the owners there was an opportunity to restructure, from partnership to limited company, and we seized upon it. The new board of directors had a united progressive attitude and a vision to create a fresh, energetic organization. It was to be a company where all employees were involved and rewarded in shaping its future. Attempting to change the culture came with some tough challenges and we learned some valuable lessons along the way, with positive outcomes and the promise of better things to come.

The challenge

Long-serving staff members were sceptical about any proposed change, having enjoyed the comfort of gradual introduction of new practices and technology and having been accustomed to a high-level management structure. The former 'family run approach' needed to be turned around to produce effective champions for change from our own staff. Being an Investor in People and actively applying the core principles of the accreditation had at least started us off on the right track with the right general ethos. The whole management structure had to be tackled to create an effective middle tier to link the whole team from top to bottom. The high-level management system that had evolved organically over the past 23 years had to be formally restructured to an inclusive system. The aim was to encourage involvement in strategic decisions, to welcome innovative ideas in exchange for tangible benefits like profit share, and a stronger sense of personal ownership and recognition. At the same time any former micro-cultures and strong influential personalities creating negative atmospheres would be filtered out.

The transition

The plan to bring fresh Vision into the company to encourage growth and evolution had to start with the drivers, the board of directors. The new board led by our visionary MD initially held regular meetings to share developments and immediate and future plans with senior staff. An evaluation of the company's true worth and its potential worth fuelled a new motivation for all stakeholders who had become complacent and comfortable with the status quo. 'What's in it for me' became clarified and stimulated an objective to pull together and work towards goals. As a board of directors we also recognized that we have legally defined responsibilities to the shareholders by whom we were elected to serve within their interest. We were mindful that any business and investment planning with damaging decisions or actions could prompt litigation.

We looked at other successful organizations that had experienced rapid growth and had the philosophy that we would like to model ourselves on. One of the common denominators determined in our research was that external diagnostics and support were commissioned

to facilitate change. We were not strangers to this approach and had historically used mentoring and training and been involved in development programmes run by external expert suppliers. We concluded that, while all the programmes we had been involved in had significant benefits that moulded some of our practices, often those very practices that we adopted were not reviewed regularly enough. We then discovered that an organization called Vistage (www.vistage.com) seemed to feature regularly as a driver for the success of fast growth organizations. Vistage boasted that it 'produced better leaders, making better decisions to achieve better results'. It claims that Vistage members are more successful than their competitors and, on average, grow their revenues at twice the percentage growth rate after joining.

Using Vistage

Vistage is an international chief executive and senior executive organization. It can be described as a support group offering development activities, critical analysis and expert coaching. The focus is on personal development, of which the benefits cascade down throughout each member's organization. Members are arranged into groups from diverse business sectors with exclusion to competitors or suppliers, allowing a forum to discuss issues openly. Members and their Vistage chairperson meet on a monthly basis and regularly enjoy mentoring from high-level expert speakers. Co-members become an extra board of advisors who take an objective look at your business and current issues in both your personal and working life, challenge you on practices and offer sound advice based on their own successful experiences. Being diverse in expertise and experience, the additional board counterbalances the talent you have in-house. A personal and business action plan is submitted each month and members commit to time-bound actions. This promotes discipline to achieve what you commit to and encourages an honest evaluation of work and personal goals. The Vistage site library offers expert advice on almost any corporate best practice or personal issue – ranging from legal advice to specific health conditions.

Our MD joined Vistage, with immediate resultant benefits, and encouraged all of our board to consider membership. I personally felt it was timely for me to join shortly afterwards and the other directors are considering their position.

Setting a new foundation

Of the new practices adopted as a result of membership, the one outstanding review was a totally fresh look at our foundation. This was as a direct result of our MD and Human Resources director attending a Vistage session with world-acclaimed speaker Vicky Schneider on the topic of 'Quintessential People Performance'[™] (www.qeperformance.com) and how the Foundation played an integral part.

The powerful message made us realize that our Mission was just a statement that was thought of years ago as part of the Investors in People accreditation process. The old Mission was remembered by only a small number of staff and it was evident that it was not understood as an encapsulation of the reason for our existence. Our Vision was blurred and needed changing to stalwartly mean something to everyone at 7Side. A new and inclusive Culture and Vision had to be agreed by all the staff, and a sound infrastructure that could effectively operate to goals had to be rebuilt. Surprisingly, our organization was very typical of those present on the day of the Vicky Schneider event and in subsequent public addresses on this subject, I have found that a sound basic foundation is a commonly missing element in many businesses.

The platform for change

A sound foundation for 7Side was much needed. Looking back at the very early days of the business no Mission or Vision was set at all. This was addressed in later years, but in reality it was purely an academic exercise. What we now needed with our 'new company' was to create a foundation that produced an inclusive direction model to drive people performance at the most fundamental level and create a milieu for all decisions and behaviours.

New Mission

All components of the foundation had to be aligned to a new meaningful Mission that was agreed on at a directors' retreat away from work distractions. Our Mission needed to be a statement that clearly describes our *raison d'être* and the value it provides from the perspective of our customers and all our stakeholders. Because of the three core areas of business we cover to

diverse markets, this is not easily described in a few words. All our attempts to create a snappy strapline reverted back to the most succinct description we could think of and our Mission now is simply:

We excel in customized information and formation solutions that are invaluable to our customers' performance.

It is an interesting exercise to ask all your employees, directors or partners if they can quote your Mission and what it actually means. The results might be an instigator to address this very basic and much overlooked elementary principle.

New vision

Taking an overall view of our future and what we are striving to become was re-enforced by our detailed three-year business plan. The higher level financial goals were set by the directors taking into account all the usual legislative, macro/micro environmental and other influences, together with pipeline developments and contracts. It became abundantly obvious that our growth targets could only be achieved by having a solid management structure in place to free up the directors' time. This would allow a far more strategic and deeper involvement in working *on the business* as opposed to *in it*.

We therefore introduced a new management structure and re-wrote our organizational chart to ensure that everyone clearly and systematically reported to a senior individual. The new management programme was initiated by appointing mainly from within, after an evaluation that revealed we had the value of experience, depth of knowledge and other great skills that could be honed. After an internal application process six senior staff members were appointed as trainee managers and are currently undergoing an intensive training programme, delivered by a respected external training agency. The cost is already being realized as a value investment.

Rolling out our outline plans was disseminated through a series of business plan structure meetings involving each manager following their own consultation with every staff member. Many innovative and practical ideas emanated from the sessions and it was concluded that the inclusion process made all staff feel more involved in their destiny within the company. The new statement of our Vision encapsulated our aspirational ideal future and how we would achieve it. Again no

cleverly spun straplines were deemed necessary and this is our Vision:

Recognized as the leading expert in Corporate Information, Company Formation and Property Search Services and a first choice employer.

New agreed values and culture

The application of coaching principles that were covered in the talk that Vicky Schnieder had delivered was pivotal to the appraisal of values and implementation of our new foundation. It was imperative that new company values were agreed by our working community and that they became profoundly imbedded, meaningful and not purely a creative strapline. The board passionately believed that our values should be a true reflection of our principles, standards, and qualities that we, as an organization in its entirety, represent and cherish.

To achieve our Mission and Vision the accomplishment of a sweeping culture change was a vital component. We wanted to establish a set of shared values, agreed attitudes, beliefs and behaviours that would epitomize a vibrant proactive corporate society with deeply rooted integrity.

Delivery of our foundation and roadmap to the future

None of the above vital elements of our desired underpinning base had been ideal in the pre-change 7Side environment. To achieve optimum effect and total 'buy-in' we organized a staff conference that was held on a Saturday. A degree of gentle coercion, together with presenting the event as an attractive proposition to attend was involved and we successfully attained full staff attendance without the need to invoke an employment contract clause that covered mandatory attendance of such an event. The offer of time in lieu and an extra day's holiday for all attendees was an added incentive.

The venue was an exclusive health club that offered post-conference spa facilities to the staff, good food and an ideal conference room. The most resistant members of staff were the very individuals that were prime for personal review and were typically the most influential in setting the scene for cultures within their immediate

team sets. It was fair to say that even the most harmonious characters arrived on the day with a trace of reluctance to forgo their usual Saturday activities and some skepticism as to what would be achieved.

We commissioned an external facilitator who advised and supported us on the planning of the conference. Staff suggestions were invited to make the event both effective and enjoyable. Our three-year strategic business plan was bolstered by a series of group staff meetings where suggestions for efficiencies, new and enhanced products and wider target markets were integrated into the plan, a synopsis of which was to be delivered at the conference with credit given to contributors.

In addition to the key subject of our new foundation we included items such as rollout of our new staff handbook, and the rationale behind policies. New or modified policies were also suggested with a promise of application of agreed actions. Other requested topics such as our own environmental policies and standards were covered.

At the event our MD delivered a passionate and sincere presentation of an exciting future where all staff would benefit and each individual would have a part to play. Personal development has always been encouraged and our recent introduction of profit share bore testament to our commitment to create a total 7Side stakeholder society that welcomed innovation. The focus of the conference was to get commitment and understanding our new foundation that was broken down and delivered as follows:

The Mission

The decision by the board to adopt the agreed statement, the deeper meaning and the desired outcome was explained in depth. The aim was to provide as much clarity as possible. To evoke memory and understanding, banners were displayed illustrating both our Mission and Vision.

The Vision

The Vision, to include our 'Big Hairy Audacious Goals' was covered in some depth and regular reference made to inclusion, transparency and how personal aspirations linked. As the vision and plan was, for the best part, a cooperative decision there was no rolling of eyes and buy-in was palpable.

New Values

Our articulated set of values was already fairly commendable and for the best part we had lived by it over the years. It was agreed that our values were a large contributory factor to the level of success that we had achieved to date. We had, after all, become recognized as prolific in all three divisions of our business with a prestigious client base including over 50 per cent of the top 100 UK law firms, leading accountancy practices and blue chip organizations. Based on a sound set of values, we asked for participation from all to ensure that the conference was interactive and a forum for good contribution and innovative ideas. Focus groups were set up to discuss and deliver their own suggestions.

Culture Covenant

We recognized that this was an area that if handled well and embedded would generate radical change. We divided teams into departments and gave them a remit to produce a flag and slogan to represent what they did and who they were. It was a fun activity whereby each team was given a box containing magazines, felt pens, sticky paper, pipe cleaners, glue, scissors and other craft kit. The groups had 30 minutes to design a team flag and slogan and another 5 minutes to present it to the rest of the audience.

Far from being a juvenile 'Blue Peteresque' activity we were amazed at the creativity and the articulation of each group's standards and desire to align to the Mission, Vision and Values. The presentations were a mixture of amusing and thought provoking. The business development team, for example, using the box containing the kit, produced three-dimensional objects to stick inside and outside the box with their slogan being '*creative thinking outside the box*'. They then devised and delivered a highly humorous presentation. Other teams used the flag and slogan as an opportunity to dispel myths – '*making IT sexy*' was well received as a means of dispelling the geek 'techy' stereotype.

I am conscious that a written account of events may come across as somewhat cheesy, which was not at all the case. There were some more serious-style slogans and formal presentations. Our 'Blue Peter' activity has since resulted in the flags being reproduced by designers for each team and has fostered a stronger

sense of team unity and identity. This was as a direct request from the teams themselves.

The same teams were then given a period of time to think of a glorious day charter, and determine what behaviours would promote a fun, energetic and efficient environment and at the same time focus on mutual respect. Equally, dealing more transparently with underlying resentments and cutting out unacceptable behaviours and attitudes would be written into each team's culture agreement. This was a real opportunity to bring to the fore every individual's perceived issues and our facilitators were extremely proficient in averting displays of harboured resentments and prompting articulation of the positives.

Post conference, each team's culture was printed, framed and displayed. The most impacting culture agreements are included in our company culture statement and used regularly in appraisals and to set the scene and the working atmosphere when we recruit. Assessments are now included in our recruitment process to establish cultural attitudes *without* filtering out positive diversity. It was not a desired outcome to have an organization full of cloned characters! At the conference quieter staff members who would not ordinarily take the podium, demonstrated hidden humorous and creative characteristics. As a result of their displays of confidence there was tangible new respect and recognition for people who had hitherto been regarded as introverts.

Infrastructure

The majority of the review of our infrastructure was evaluated pre-conference. This covered physical, human and operational resources, and any requests supported by a good business case were favourably viewed with a commitment to deliver speedy decisions. Our recent introduction of trainee manager coaching and mentoring had the cascading beneficial effect of being a more efficient way to establish training needs for every staff member. The conference was a further open opportunity for suggestions to provide all employees with the resources and direction they need to do their jobs well.

We recognized that an aligned Infrastructure and Foundation would deliver consistent messages about who the company is, its direction, and how people are



expected to behave. The confidence of knowing what is expected of all concerned cultivates empowerment for employees to make appropriate decisions confidently and independently. The following elements of the infrastructure we felt were already fairly efficient, although, complacency not being one of our defined values, we commit to constant review:

Policies

Our recent review of policies was covered quite extensively in our employee handbook. This supported our overall guideline to establish parameters for present

and future decisions. Other policies relating to strategic decisions, plans and customer-related policies are now constantly reviewed, as in any effective corporate structure.

Procedures

As an organization we had been acclaimed for well-documented procedures although this is a work in progress. The series of steps followed in a regular, definite order to accomplish a specific end-result are documented with clarity to all employed in the multitude of functions involved in every aspect of our business.

Systems

A definition of the above and an acceptance of its relevance aid support of the overall infrastructure. The systems, by our own definition, are the logical arrangement of all the obvious elements of running a business, extending through equipment, people, procedures, strategic planning, business development, recruitment, communications, stock control and order processing.

Tools

This is the seemingly obvious infrastructure element of required equipment, materials and adequate resources. We still however asked ourselves the question 'do we have the tools needed to get the job done and do our team have all the resources and direction to help accomplish the "excel" part of our mission? Are our policies, procedures, systems, and tools adequate to support the company's aspired future – our Vision?' The evaluation is, of course, not a single exercise nor a revelation, although the review in line with the foundation did highlight gaps and acceptance of continuing with a regular review system.

Communications

Poor communication is the most commonly recognized area for required enhancement within and outside of most corporate structures. Although perfect communication in isolation is not the panacea for an ideal world, appropriate, clear and transparent communication certainly ranks very highly in good relationships and proficient service or systems. We seek to achieve an environment where each individual's personal aspirations and expectations whilst in our employ link to the 7Side Vision and Values. Our vision of success with communication as key contains the following inter-related components:

- shared expectations;
- goals;
- measurable outcomes (to account for successes and failures);
- accountability.

A good culture is a further stimulant for good communication and if, as in our case, it is set and agreed by all our people, behaviour outside of the parameters of the charter can be more easily addressed.

Individuals

The last and highly critical element of the infrastructure is ensuring that the work-related attributes, knowledge, and skills each individual possesses are an appropriate fit with each job role and the shared culture. Desire and attitude are also high requisites both for new recruits and existing staff. Knowledge translated into action supports valuable employed skills. We recognize that it is our people and not procedures that lead positive change initiatives. We aspire to attain ultimate people performance, with the right people in the right seats performing to at least defined standards or above expectations. We want to attract and retain stars and minimize micromanagement.

Summary

Living by our New Foundation has transformed multiple facets of our organization. A recent staff poll asking very specific and open questions prompted extremely positive responses. A prior survey, pre-foundation rollout, identified multiple gaps and an indication that our former management style was perceived as tending to be authoritative and autocratic. The inclusion policy, clarity of plans, the additional level of management and all the other factors has created a company that was described by one survey contributor as 'fit, fun, fresh and going places'.

We as owners are hoping to go to that place that increases our turnover by 33 per cent this financial year end, and a further 45 per cent in 2008/9. We are on course to achieving our goals by living by the simple but powerful formula of a sound foundation and the prospect of the journey ahead is exciting.

Since this article was submitted, 7Side Ltd has been recognized for outstanding customer service by winning the British & Irish Association of Law Librarians Customer Relations Initiative Award for 2007.