EXECUTIVE LEADERSHIP / CASE STUDY 03

WORKFORCE ENABLEMENT

From core values to daily KPIs, pay decisions, career growth and leadership succession

FINANCIAL SERVICES | MORTGAGE LENDING • SALES & OPERATIONS • VALUES-BASED PERFORMANCE

STRATEGIC TRANSFORMATION BLUEPRINT

- **Values First:** Translated the organization's vision, mission and core values into observable daily behaviours.
- **Values-Based KPIs:** Gave every core value a measure, so each scorecard tracked results and how they were achieved.
- **Knowledge Library:** One owned, audited source for SOPs, FAQs and approved responses, so every answer was accurate and instant.
- **Performance Cadence:** Weekly coaching rolled into monthly reviews, quarterly evaluations and an annual review.
- **Rewards with Rules:** Set bonuses, salary increases and promotions from a data-based scorecard, not manager discretion.
- **Career Path:** Matched each person's strengths, interests and goals to learning, coaching, shadowing and cross-training, so people grew here instead of leaving.
- **Succession by Design:** Built career paths and successor roadmaps for every critical role.

Program scope: Knowledge library | Learning academy | Call QA | Values-based scorecards | Bonus & merit framework | Succession plans

VALUES FOUNDATION | FROM VISION TO SCORECARD

Vision, mission and core values became the scorecard.

The organization's own values are confidential, so they are illustrated here through my G.R.O.W.T.H. framework. The method was the same: define each value as daily behaviour, give it a measure, and score it alongside results.

VALUES TO METRICS | THE METHOD, ILLUSTRATED WITH G.R.O.W.T.H.

CORE VALUE	WHAT IT LOOKS LIKE DAILY	HOW IT WAS MEASURED
G Guardianship	Treat what is entrusted to you as your own; leave every file better than you found it	**File accuracy, QA compliance score, documentation completeness**
R Resilience	Own every outcome and turn setbacks into the next win	**Follow-up completion, recovered opportunities, first-contact resolution**
O Originality	Question what is and step beyond the familiar	**Improvement ideas implemented, knowledge library contributions**
W Winning Culture	Be your best, empower others and set the standard	**Target attainment, learning modules completed, peer coaching**
T Transparency	Know the facts, speak the truth, act with integrity when no one is watching	**CRM data accuracy, forecast accuracy, on-time status updates**
H Heart-Led	Lead with care for the customer and the team	**Customer satisfaction score, peer recognition, team contribution**

TRANSFORMATION IMPACT | BEFORE / AFTER / CHANGE

PERFORMANCE KPI	BEFORE	AFTER	BUSINESS IMPACT
Average call hold time	~6 min	Under 2 min	**~67% shorter holds, answers at their fingertips**
Knowledge content accuracy (audited)	68%	98%	**+30 pp, one trusted version of the truth**
First-contact resolution	45%	~80%	**+35 pp, 4 in 5 resolved first time**
Supervisor escalations per week	~30	~7	**~75% fewer, frontline self-sufficient**
SOP updates published within 48 hrs	30%	95%	**+65 pp, every section has a named owner**
Bonus decisions backed by scorecard data	~20%	100%	**+80 pp, data-driven, visible and consistent**
Time to proficiency (new hires)	12 weeks	6 weeks	**50% faster ramp to full productivity**
Average call QA score	72%	91%	**+19 pp, higher interaction quality**
Employee satisfaction score (out of 5)	3.1	4.4	**+1.3 points, people saw a future here**
Voluntary staff turnover	38%	16%	**22 pp lower, talent retained**

IDENTIFIED CHALLENGES | TRANSFORMATION BASELINE

OPERATING GAP	FRAGMENTED BASELINE	BUSINESS CONSEQUENCE
Knowledge access	Critical guidance spread across teams and individual tenure	**Answers depended on who you asked**
Process changes	Updates hard to circulate, approved information slow to find	**Staff relied on informal handoffs**
Onboarding	Training varied by function with no role pathways	**New hires ramped at different speeds**
Values	Core values posted on the wall but never measured	**Culture described, not managed**
Scorecards	No comparable scorecards or common KPI definitions	**Performance could not be compared across teams**
Coaching & QA	Call reviews not integrated, coaching relied on informal feedback	**Training gaps surfaced inconsistently**
Review rhythm	No set cadence from weekly coaching to annual review	**Year-end ratings based on recent memory**
Pay decisions	Bonuses and raises set by manager judgment	**Rewards disconnected from values and results**
Career paths	Advancement criteria unclear, high performers lacked roadmaps	**Top talent left to find growth elsewhere**
Succession	No named successors for team lead or manager roles	**Leadership gaps every time someone left**

SCORECARD PROGRESSION | WEEK TO MONTH TO QUARTER TO YEAR

01 KNOWLEDGE LIBRARY *The foundation*	02 WEEKLY COACHING *Team lead 1:1*	03 MONTHLY REVIEW *Team lead scorecard*	04 QUARTERLY EVALUATION *Manager review*	05 ANNUAL REVIEW *Senior Director review*	06 SUCCESSION PIPELINE *Grow from within*
• SOPs, FAQs & approved responses • Named owner for every page • 48-hour update standard • Learning modules & assessments • Usage & completion feed the scorecard	• Activity KPIs vs. targets • Call QA review & feedback • One skill to build this week • Knowledge gaps sent to the library • Week rolls into month	• Results & values scored together • Recognition & spot awards • Learning plan updated • Coaching actions followed up • Month rolls into quarter	• Three-month trend reviewed • Rating on each core value • Quarterly bonus calculated • Promotion readiness flagged • Quarter rolls into year	• Four quarters combined • Merit increase set by rating • Annual bonus & recognition • Next role agreed • Development goals for next year	• Successor named for every lead & manager • Ready now / ready later bench • Leadership modules in the library • Acting & stretch assignments • Internal candidates considered first

REWARDS & ADVANCEMENT | HOW THE SCORECARD SET PAY AND PROGRESSION

DECISION	HOW IT WAS SET	LINK TO VALUES & LEARNING
Monthly recognition	Top monthly scorecards on results and values	**Peers and leads nominated against core value behaviours**
Quarterly bonus	70% results KPIs, 30% core values rating	**No bonus on results alone when the values rating fell below standard**
Annual merit increase	Set by annual rating band, four quarters combined	**Same criteria for every role, explainable to every employee**
Annual bonus	Company target × individual rating multiplier	**Rewarded sustained performance, not one strong quarter**
Promotion eligibility	Learning path complete plus 2 qualifying quarters	**Knowledge earned in the library became the promotion gate**
Leadership readiness	Leadership modules, peer coaching and acting-lead assignments	**Top performers trained to lead before the role opened**

SUCCESSION PLANNING | A BENCH FOR EVERY LEADERSHIP ROLE

ROLE	SUCCESSOR PIPELINE	HOW READINESS WAS BUILT
Managers	Team leads with 2+ quarters at top rating	**Acting manager coverage, budget, hiring and quarterly evaluation exposure**
Team leads	Senior advisors and specialists	**Ran weekly coaching under supervision, led huddles, owned a library section**
Senior advisors	Top-rated frontline performers	**Mentored new hires, certified on advanced modules, led QA calibration**
Frontline	New hires on a defined learning path	**30/60/90-day checkpoints, assessments and achievement levels**

TRANSFORMATION OUTCOMES | SIX G.R.O.W.T.H. LEADERSHIP PILLARS

01 BUSINESS TRANSFORMATION		
• Turned core values into a measurable operating system	• Linked the library, coaching and reviews in one cadence	• Built a bench for every lead and manager role
02 CUSTOMER EXPERIENCE		
• Cut call hold time from ~6 min to under 2 min	• Lifted first-contact resolution from 45% to ~80%	• Connected service issues directly to the library
03 SALES, OPS & SYSTEMS		
• Raised audited content accuracy from 68% to 98%	• Rolled scorecards up from week to year	• Gave every SOP an owner and update standard
04 PEOPLE & CULTURE		
• Scored every role on results and values	• Made pay and promotion criteria transparent	• Promoted leaders from within
05 DATA, PERFORMANCE & GOVERNANCE		
• Common KPI definitions for every role	• Calibrated ratings across managers	• Same rules for raises and bonuses
06 REVENUE & GTM		
• Improved seller readiness and follow-up quality	• Aligned bonuses to business targets and values	• Directed coaching toward conversion

LEADERSHIP BENCH | SUCCESSION BUILT FROM WITHIN

100%
ROLES WITH A NAMED SUCCESSOR
Every team lead and manager position

9
LEADERSHIP ROLES FILLED INTERNALLY
Team leads and senior role promoted from within

98%
CONTENT ACCURACY
Providing first point of contact resolution

EXECUTIVE LEADERSHIP IMPACT

Values that are not measured are decorations on the wall.

Gave every employee the tools to learn, put knowledge at their fingertips, made every measure visible and held everyone to the same standard. Because every decision rested on data, people could see exactly how to grow with the organization.