

# Strategic Culture Journey

- Rustin Becker – ERDMAN
- Brian Happ – ERDMAN
- Andrea Hopkins – ERDMAN
- Alysun Hudepohl – Human Synergetics



# Today's Speakers



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50 years

Changing the World –  
One Organization at a Time™

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Research and Development by:  
Robert A. Cooke, Ph.D. and J. Clayton Lafferty, Ph.D.

ERDMAN

INTEGRATIVE THINKING. HEALTHIER COMMUNITIES.

# HS Integrated Assessments

## ORGANIZATIONS

Organizational Culture Inventory® (OCI®)



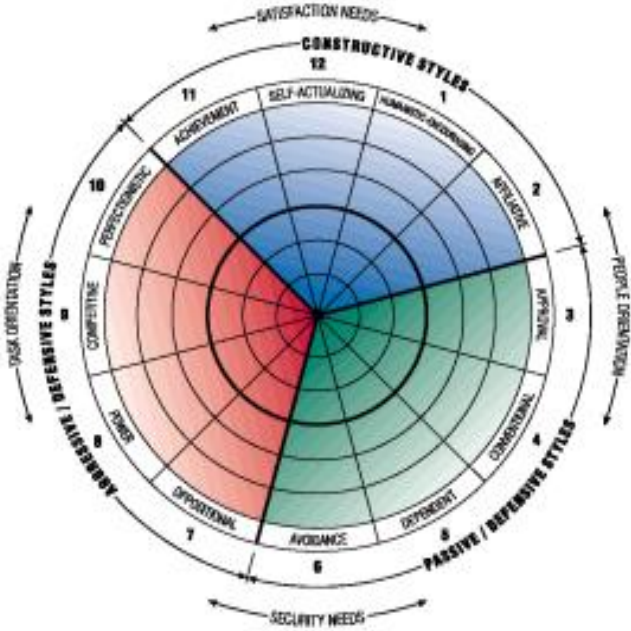
## LEADERSHIP

Leadership/Impact® (L/I)



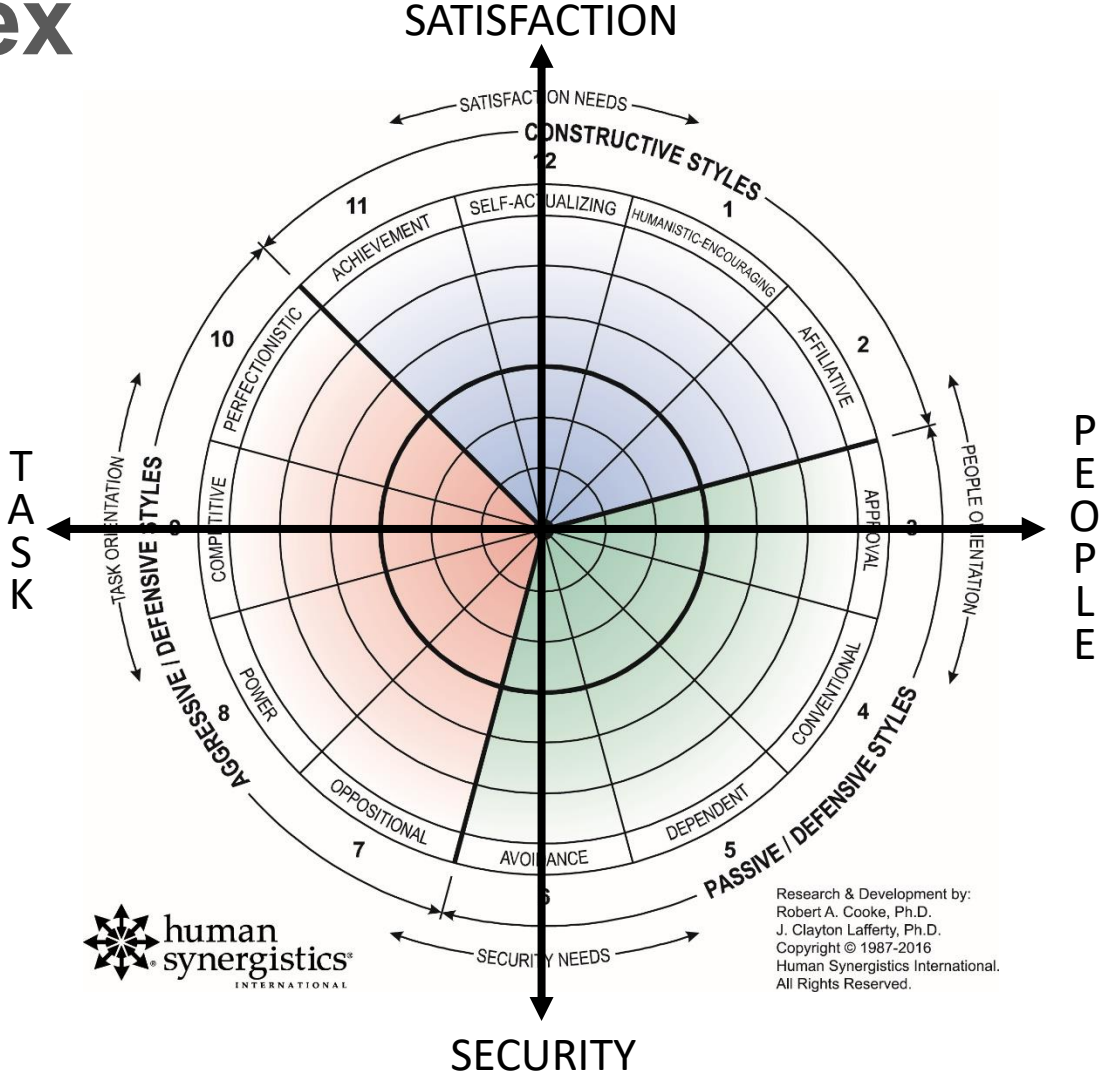
## INDIVIDUALS

Life Styles Inventory™ (LSI)





# The Circumplex



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# Integrative Thinking. Healthier Communities.

OUR VISION IS TO IMPROVE EVERY LIFE WE TOUCH. THIS IS REALIZED BY A UNIFIED FAMILY CELEBRATING CREATIVITY, AND LOVE OF PEOPLE WITH A SHARED PURPOSE TO IMPROVE LIVES.

## EXPERIENCE

6000+

HEALTHCARE & SENIOR LIVING  
PROJECTS



100+

EXPERTS NATIONWIDE

\$1.5B

PROJECTS COMPLETED  
OVER LAST 10 YEARS


1951

FOUNDED



NATIONAL EXPERTISE  
RESULTING IN LOCAL SUCCESS

# Culture Strategy Through the Eras

2001	2008	2012 - 2021	2022 - 
<p><b>Family to Institutional</b></p> <ul style="list-style-type: none"> <li>• Legacy management</li> <li>• Extreme passive/aggressive behaviors</li> <li>• Individualism</li> <li>• Survey scores were low, especially for SLT</li> <li>• Good market, internal change needed</li> <li>• External coach for SLT</li> </ul>	<p><b>Institutional to Public</b></p> <ul style="list-style-type: none"> <li>• Change in strategy and leadership philosophy</li> <li>• Great recession and significant downsizing</li> <li>• Culture quickly changed</li> <li>• Executive leadership is critical</li> </ul>	<p><b>Public to Private</b></p> <ul style="list-style-type: none"> <li>• Average survey scores</li> <li>• Management willing to grow</li> <li>• SLT needed building</li> <li>• Significant market changes, internal change needed</li> <li>• External coach for SLT</li> </ul>	<p><b>What's Next?</b></p> <ul style="list-style-type: none"> <li>• Growing leaders to advance culture</li> <li>• Define &amp; share the ERDMAN Experience</li> </ul>

# Key Considerations to Launch Your Culture Journey

1. Make Culture an equally important component of your strategic pillars.
2. Assess your leadership team's capacity to make the journey.
3. Create long-term vision, plan short-term initiatives.
4. Exemplify consistency and persistence – ALWAYS.
5. Invite key leaders and team members to do great work and be Culture champions.

# VISION, MISSION, VALUES

*Our Vision:*  
**Improving every life we touch.**

*This is Realized By,*  
**A unified family celebrating diversity, creativity,  
and love of people with a shared purpose to improve lives.**

*Our Mission:*  
**Rethinking the future of healthcare  
so leaders can build healthier communities.**

*Our people live and breathe these values through a foundation of integrity and honesty.*

## COMMIT TO EXCELLENCE

I set high standards for myself, and have an attitude to deliver high quality products and services in all that I do for my clients, colleagues, and community.

## BE THE CLIENT'S CHOICE

I earn my clients' trust by treating clients as priorities and creating long-term partnerships with shared success.

## APPLY CREATIVE THINKING

I create an atmosphere that values the application of new ideas, processes, or concepts that make ERDMAN better for my teammates and my clients.

## BE ALL IN

I am emotionally invested in ERDMAN and my teammates, celebrating our successes and holding myself accountable to others for my results.

## LEADERSHIP

Champions ERDMAN's Vision, Mission, Goals, Values, and Service Offerings in a way that motivates others to reach beyond their own experiences.



# Equal Strategic Pillars

STRATEGIC PILLAR – MARKET

STRATEGIC PILLAR – DELIVERY

STRATEGIC PILLAR – *CULTURE*



# Primary Goals Supporting Culture Pillar

- ERDMAN will be the employer of choice, as evidenced by our ability to attract top level talent, our culture index, employment satisfaction scores, retention metrics, and the feedback we receive from candidates.
- ERDMAN will be known for its constructive culture of leadership anchored in our values and common purpose, celebrating at all levels of the organization, measured by our culture index and employee survey.

# Culture Journey Implementation – Strategic Planning Initiatives

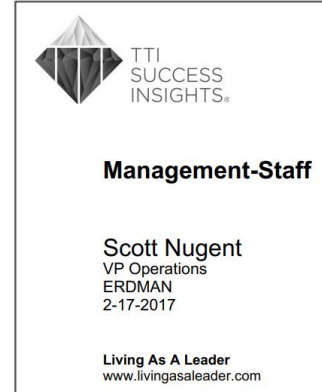
2012	2015	2018	2019 – 2022 & Beyond
<ul style="list-style-type: none"> <li>Senior Leadership Team Formation, Evaluation, and Development Plans</li> <li>Initial definition of strategic pillars</li> <li>Formation of Teams: Recognition, Communications, Employee Events</li> </ul>	<ul style="list-style-type: none"> <li>Third Party SLT / OD Facilitator</li> <li>SLT Development and 1:1 Coaching</li> <li>SLT Evolution / Transitions</li> <li>INSPIRE Program</li> <li>Workforce Planning &amp; Organizational Design</li> <li>Competency-Based Job Descriptions</li> <li>1:1 Implementation in 2016</li> </ul>	<ul style="list-style-type: none"> <li>1:1 System Implementation</li> <li>Talent Reviews</li> <li>INSPIRE Program</li> <li>Career Development Programming</li> <li>ERDMAN Experience</li> <li>ERDMAN Excellence Recreated &amp; Branded</li> </ul>	<ul style="list-style-type: none"> <li>Leadership Pipeline</li> <li>Next Level Leaders</li> <li>Great Places to Work</li> <li>Ingenuity Awards</li> <li>Talent Acquisition / Development</li> <li>Employer Brand</li> <li>Affinity Groups</li> <li>ERDMAN Experience 2.0 (Innovation, Knowledge Sharing, Celebration, Social, Giving, Growth &amp; Learning)</li> <li>New HCMS</li> <li>Dedicated OD Leadership</li> </ul>
<ul style="list-style-type: none"> <li>Strategic Planning Process</li> <li>Business Development Strategy and Processes</li> <li>CRM System Development</li> <li>Systems Separation</li> <li>Web Site Creation</li> <li>Advisory Services</li> </ul>	<ul style="list-style-type: none"> <li>Brand Strategy</li> <li>Redefined Market &amp; BD Strategy</li> <li>Senior Living Vertical</li> <li>Operational / Experiential Planning Work</li> <li>Lean / Continuous Improvement</li> <li>Risk Mitigation on Large Projects</li> <li>Lessons Learned Process</li> <li>Project Leadership Retreats</li> </ul>	<ul style="list-style-type: none"> <li>Advisory Council</li> <li>Thought Leadership Program</li> <li>Launched Project Delivery Framework</li> <li>Preconstruction &amp; Parametric Models</li> <li>Operations Retreat &amp; Training</li> <li>Unbundled A/E Offering</li> <li>Real Estate Development</li> </ul>	<ul style="list-style-type: none"> <li>Advisory Services Expansion</li> <li>Dashboard Metrics</li> <li>Project Delivery Framework Improvements &amp; Training</li> <li>Operational Leadership Team</li> <li>MarCom Strategy / Expansion</li> <li>Master Planning</li> <li>A&amp;E Execution</li> </ul>

# SLT Leadership Toolkit

- Self-Awareness and Readiness for Self Development
- Leadership Competencies Clearly Defined; WGLL – What Good Looks Like
  1. Learner (Developing Practitioner; Building Self-Awareness)
  2. Solid Practitioner (Developing and Applying Leadership Behaviors)
  3. Expert (Demonstrating Leadership Behaviors; Developing People)
  4. Master (Implementation Responsibility; Developing People & Teams)
  5. Executive (Strategic Responsibility; Developing Level 4 Leaders)
- Accountable Leadership Behaviors – Acceptable / Unacceptable
  - Align and integrate one leadership voice
  - Take responsibility for delivering a consistent client and team member experience

# Talent Toolkit

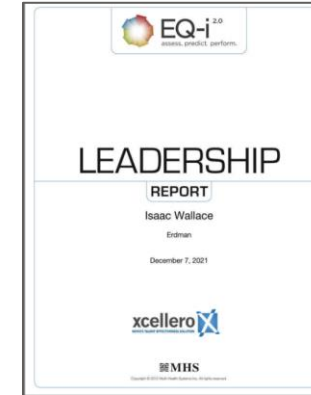
## Leadership/Impact (L/I) DISC



## MBTI



## EQi



1:1s

Check-in Comments

Home > Higgins, Andrea > Full-time Employee > Member > ERDMAN E 1 > Initial Date: Jan 26, 2022 > Post

Please check only one box for each criteria

	1	2	3	4	5	Answer by
On a scale of 1-5, I would rate myself personally as:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Member
On a scale of 1-5, I would rate myself professionally as:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Member
I would like to talk about the following item(s) that would help me:						New Cancel
Higgins, Andrea (Direct Manager)	<input type="text"/>					
Zimelman, Jessica (Member)	<input type="text"/>					
In the past month, I demonstrated leadership and contributed to ERDMAN's constructive (blue) culture in the following way(s):						New Cancel
Higgins, Andrea (Direct Manager)	<input type="text"/>					
Zimelman, Jessica (Member)	<input type="text"/>					
Share an example of where I, your manager, demonstrated leadership successfully and where I could improve my leadership.						New Cancel
Higgins, Andrea (Direct Manager)	<input type="text"/>					
Zimelman, Jessica (Member)	<input type="text"/>					

Round Robin

1. Start doing
2. Stop doing
3. Keep doing

Peer Accountability

SLT – March 2022 Leadership Development Plan Update

Items I've Focused On Since Last Meeting	Actions/Behaviors I've Taken To Improve Since Last Meeting	What Help Do I Need? (who, what, when, where)

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# Talent Toolkit

## Career Goal Discovery

Name	Modified	Modified By
1-1 Connections - Conversations That Count	May 8, 2020	Andrea Hopkins
Accountable Teams	October 14, 2019	Andrea Hopkins
After Action Reviews (AAR)	May 10, 2020	Andrea Hopkins
Assessments for Development	May 8, 2020	Andrea Hopkins
Bring Out the Best in Your Teams	February 20, 2019	Jane Andrus
Client Relationship Management Training - TED	February 13	Andrea Hopkins
Communicate by Design	February 20, 2019	Jane Andrus
Conduct the Performance Review Conversation	February 20, 2019	Jane Andrus
Constructive Culture - Mission, Vision, Values	May 8, 2020	Andrea Hopkins
Create a Culture of Employee Engagement	February 20, 2019	Jane Andrus
Emotional Intelligence	May 21, 2020	Andrea Hopkins
How ERDMAN Makes Money	January 31	Andrea Hopkins
Lead by Design	February 20, 2019	Jane Andrus
Leader of Leaders	February 20, 2019	Jane Andrus
Maximize Performance 365 Days a Year	February 20, 2019	Jane Andrus
Onboarding	March 5	Andrea Hopkins

Common Training, Job Aids, Systems, and Language

## Competency Assessments

View History	Member Comments	Manager Comments	Learner	Solid Practitioner	Expert	Master	Executive
View History			○	○	○	○	●
View History			○	○	●	○	○

## INSPIRE Training

## Talent Development Plan

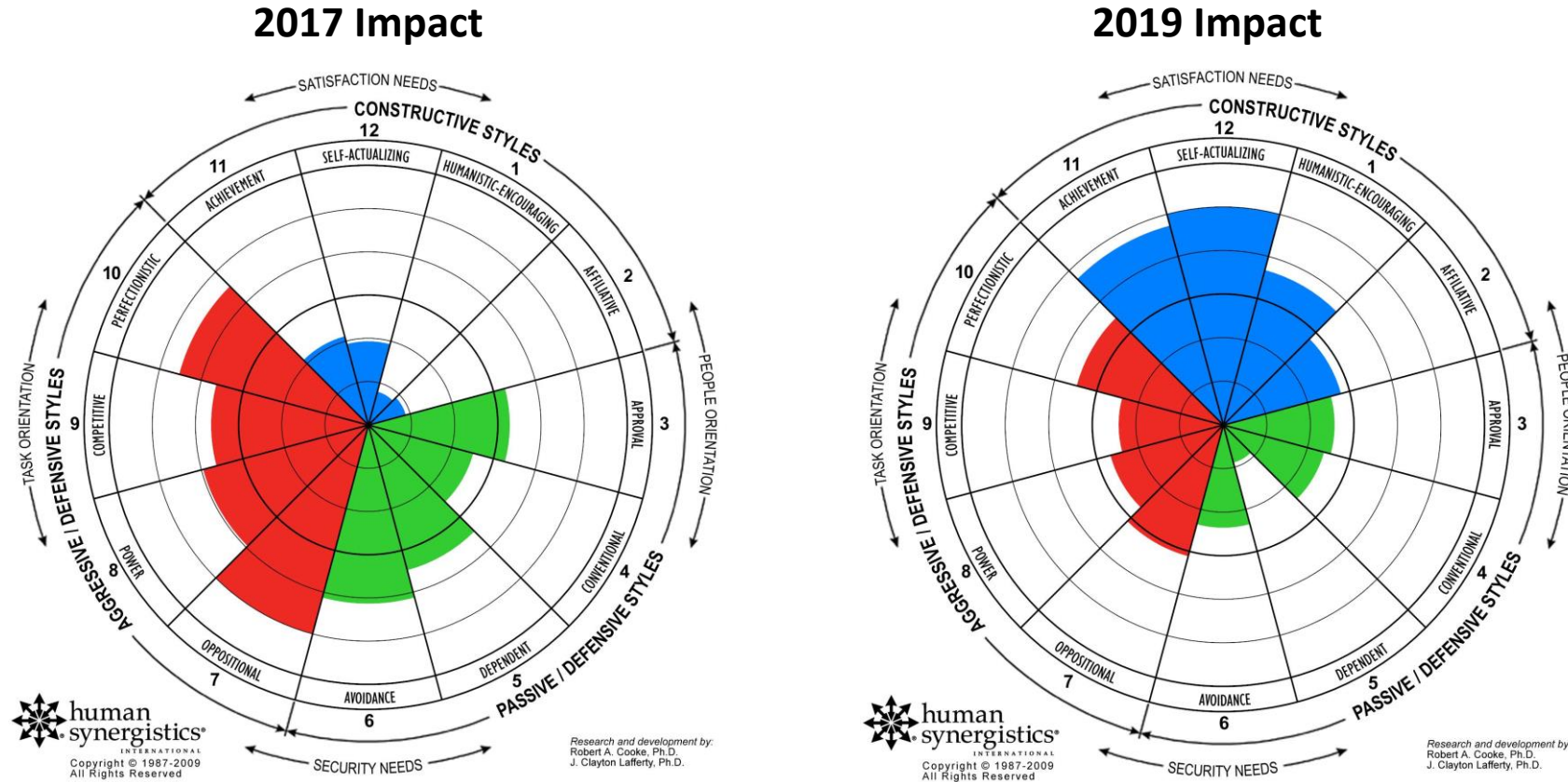
# ERDMAN Experience™ Teams Forming & Collaborating

Integrative Thinking. Healthier Communities.

- **Communication Team:** All-Calls, Town Halls, Tech Wall, Teams Channel, and Internal Team Advancing Communication & Brand
- **Recognition Team:** ERDMAN Excellence, Ingenuity Awards, Thumbprints, Project Milestones, Professional Milestones, Personal Milestones, Service Awards
- **Social Team Leaders with SLT and OLT Co-Leaders:** Coffee Crew, Thirsty Thursdays, Golf Outing, Mallard's Game
- **Community Impact Team:** Corporate Social Responsibility, United Way Campaign, Habitat for Humanity
- **Innovation Teams:** Design Charrette, OLT Processes to Improve, INSPIRE Challenges, Company Awards, Thought Leadership, After Action Reviews
- **Self Development:** Industry, Business Development, Project Delivery, Leadership
- **Other Affinity Groups:** Field & Stream, Women in the Workplace, AXP Teams



# Significant Individual SLT Leadership Impact (L/I) Change



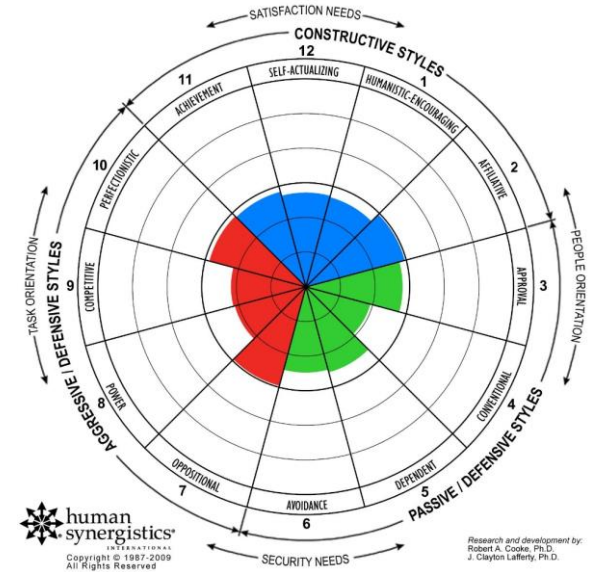
## Catalysts for Movement:

- Coaching support of each other, CEO, and outside coaches as needed
- Feedback loops incorporated; invitation for multi-level feedback
- Vulnerability practiced with next level leaders
- Reports and development plans shared with next level leaders
- Emotional intelligence assessment introduced

# Composite Leadership/Impact Results: 2017 - 2022

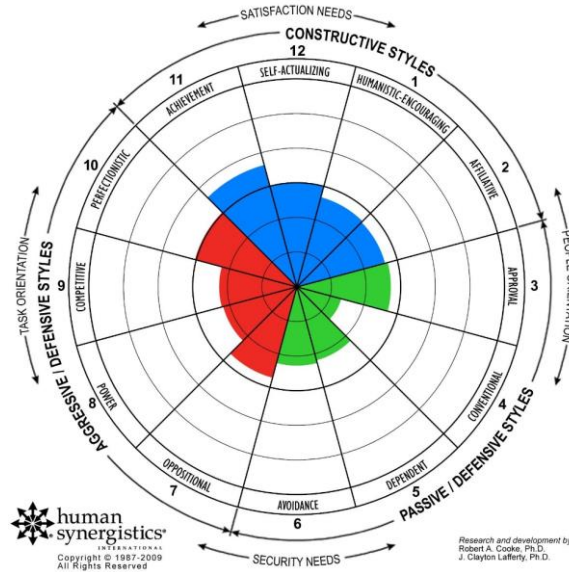
2017

N=137 / 10 Leaders



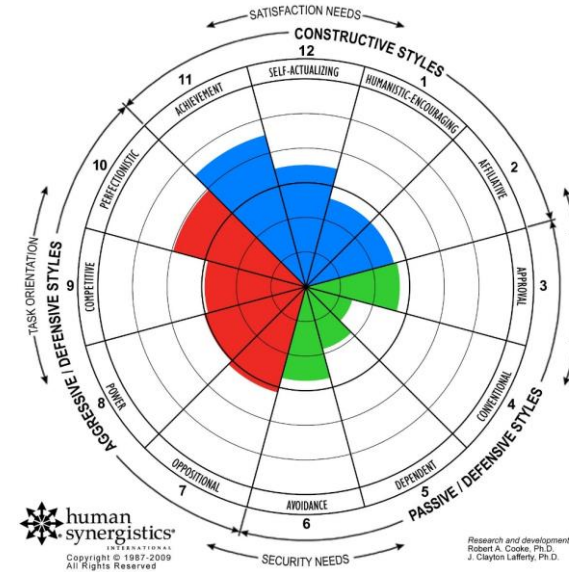
2018

N=105 / 8 Leaders



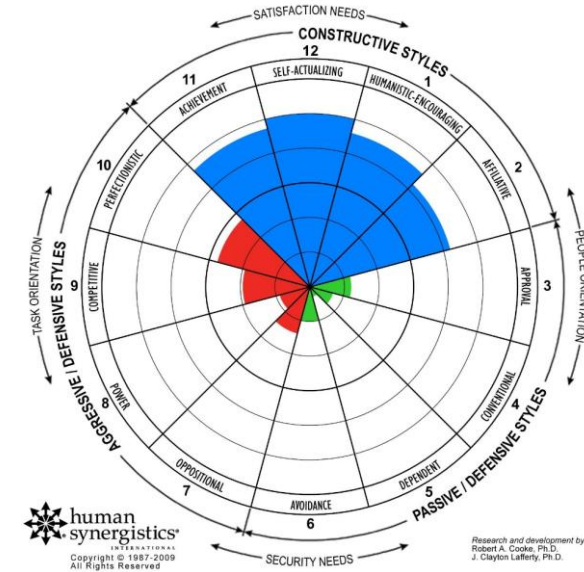
2021

N=84 / 6 Leaders



2022

N=84 / 7 Leaders

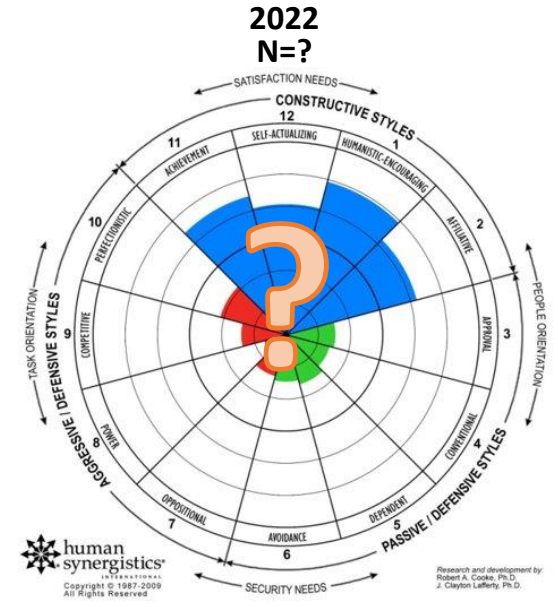
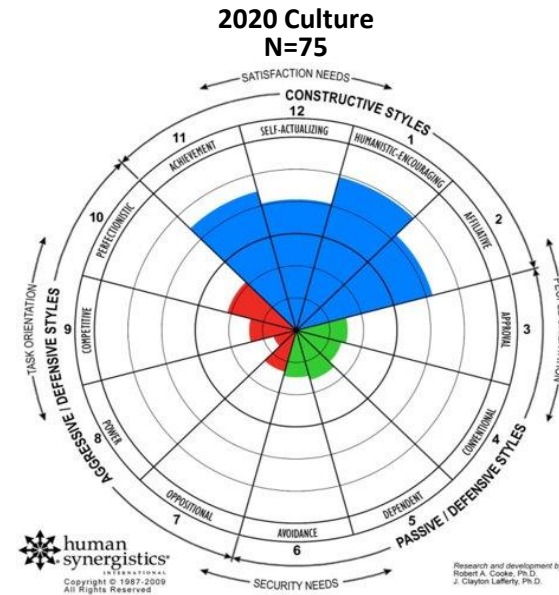
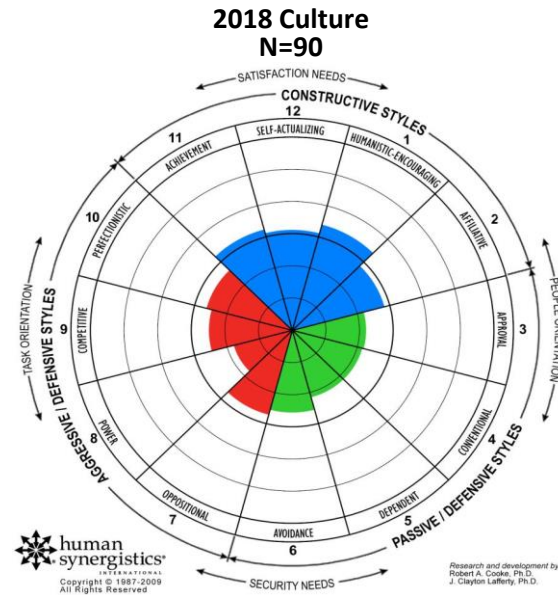
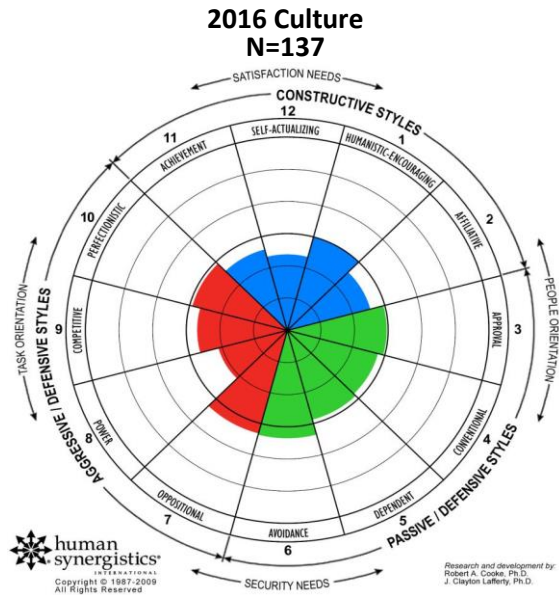


## Catalysts for Movement:

- Coaching support of each other, CEO, and outside coaches as needed
- SLT being very clear on what behavior is tolerable and what is intolerable in leaders
- Transition of key roles impeding progress; addition of highly constructive leaders; development of rising leaders
- Emotional intelligence assessment introduced



# OCI® Culture Transformation 2016 - 2022

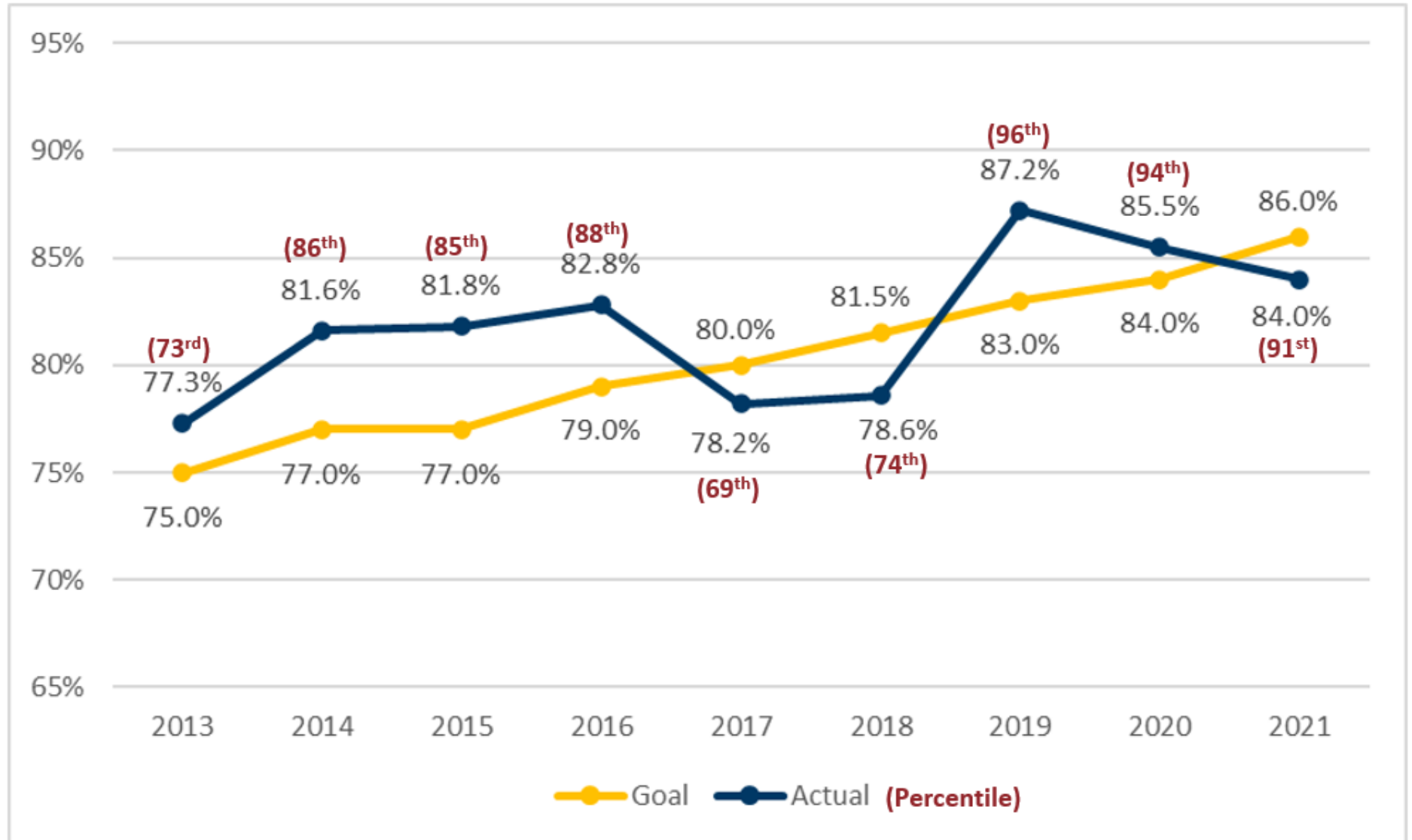




# Employee Engagement Results Against Plan

## About the Survey

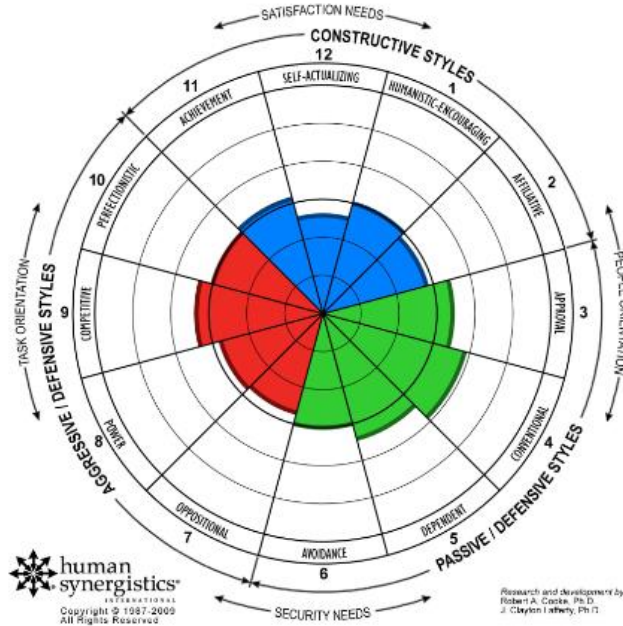
- 16 work-specific survey categories; 4 COVID-19 related items
- 94 work-specific survey questions
- 70 questions had comparisons to the external norm group
- Section for additional comments
- 91% response rate; 60%+/- average with surveyed companies



# Composite Next Level Leader (LSI-ILF) Results 2020

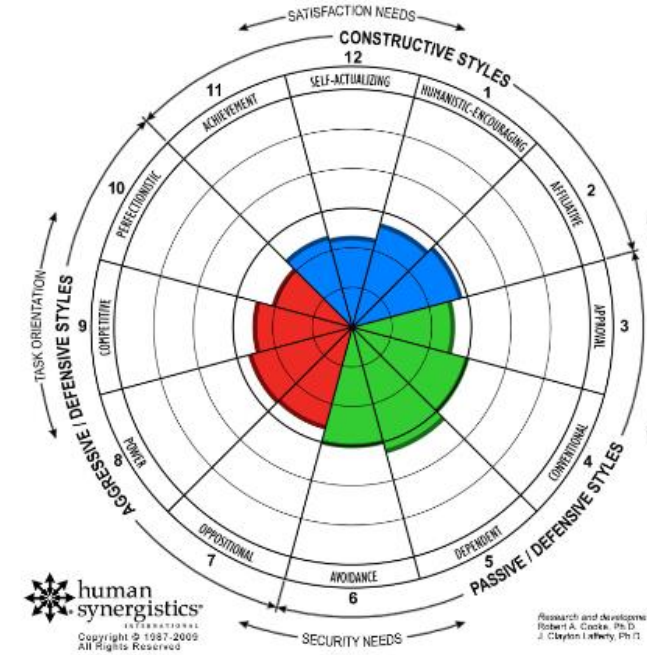
## Self-Description 2020

29 Focal Individuals



## Description by Others 2020

315 Respondents Describing 29 Focal Individuals



### Catalysts: Repeat and Accelerate SLT Learning with NLL:

1. Make Culture an equally important component of your strategic pillars.
2. Assess your leadership team's capacity to make the journey.
3. Create long-term vision, plan short-term initiatives.
4. Exemplify consistency and persistence – ALWAYS.
5. Invite key leaders and team members to do great work and be Culture champions.

# Keys Results from a Sustainable Culture

## COMPANY



## CLIENT



## COMMUNITY



## COLLEAGUES & CANDIDATES



<ul style="list-style-type: none"> <li>• Top 10% of engagement</li> <li>• Significant shift to constructive behaviors</li> <li>• Increased ability to recruit the "right" people</li> <li>• Significantly improved margins, reduced variation</li> </ul>	<ul style="list-style-type: none"> <li>• Increased number of "ERDMAN Fans"</li> <li>• Increased referral network</li> <li>• Increased repeat business</li> <li>• Client's love working with our people – "it feels different to work with ERDMAN"</li> </ul>	<ul style="list-style-type: none"> <li>• Increased community involvement</li> <li>• Charitable culture</li> <li>• Increased awareness of community impact by others (internal &amp; external)</li> </ul>	<ul style="list-style-type: none"> <li>• Empowered</li> <li>• Multiple employee driven initiatives &amp; teams</li> <li>• Willingness to help each other</li> <li>• Community</li> <li>• More frequent meaningful/impactful conversations</li> <li>• Improved relationships inside &amp; outside the work environment</li> </ul>
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## 5 Actionable Take-Aways for Reflection

- ✓ Make Culture an equally important component of your strategic pillars.
- ✓ Assess your leadership team's capacity to make the journey.
- ✓ Create long-term vision, plan short-term initiatives.
- ✓ Exemplify consistency and persistence – ALWAYS.
- ✓ Invite key leaders and team members to do great work and be Culture champions.

# Q & A



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# Thanks for joining us!

*For questions & assistance, contact us...*

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