

## CASE STUDY

Consultation was sought by a Fortune 500 multinational corporation (“MNC”) that had identified a series of problems involving actual and potential costly errors in how the mismanagement of certain national accounts was jeopardizing client relationships at the global level. For example, dissatisfaction with the timeliness of service delivery to a client with a relatively small account in a given country was passed up that client’s chain of command, leading the CEO to begin questioning the possibility of terminating their substantial global account for services with the MNC. The financial repercussions, while minor for the portfolio of the MNC’s “in country” representatives, were quite significant from the perspective of the MNC’s C-Suite, especially after it was discovered that this kind of insufficient coordination of accounts was pervasive within the company’s global operations.

The MNC’s Senior Partner for Global Growth and Operations, responding to a C-Suite directive to rectify this problem, began developing a team of internal consultants to work with MNC agents in various countries around the world involved with the firm’s largest eighty global clients. Although he also created a protocol he wanted the team to use for identifying and addressing specific client-based issues, he was concerned that the consultants might come across to in-country agents as too critical and heavy-handed, and thus not succeed in effectively engaging their full cooperation in improving client services. Based in this concern, he contacted Flexible Engagement Resources, LLC for consultation.

After an initial assessment, an intervention involving two days of intensive FlexEngage training was recommended for the MNC’s newly formed team of internal consultants. On the first day, after the FlexEngage Matrix was introduced to the participants, training was conducted in the component skills of awareness, openness, and engagement. The FlexEngage Matrix then was revisited in a team building exercise during which the lower right quadrant question was reformulated as a group task, that is, instead of asking individuals to reflect on who or what matters to them, the team was asked to consider their shared purpose. Each of the other three FlexEngage Matrix questions then were explored sequentially by the group from the perspective of the common ground they had identified. On the second day, following further component skill training, the participants again completed the FlexEngage Matrix, first from the perspective of the MNC’s in-country agents, and then from the perspective of their clients. This served to foster a sense of empathic understanding for the participants of the points of view of the other parties with whom they would be consulting. Plans were made for each participant to use the FlexEngage Matrix in formulating their approach each time they were asked to provide consultation.

Although consideration was given to the possibility of proceeding with further training for the consultants or for the MNC’s in-country agents, it turned out that the initial training proved sufficient. As summarized in feedback subsequently provided by the MNC’s Senior Partner for Global Operations and Growth three months after the project was launched in Latin America:



*Regarding FlexEngage, we rolled out the training to our consulting team. I will say the prior session we had was valuable from my perspective to frame up and diagnose the issues and challenges we’re facing.*

*The good news is we’re now 90 days into the rollout and the model is working well. We’ve helped to resolve a lot of local issues and are generating useful insights to inform our strategies going forward. We are also expanding to Asia in 4Q so the project leader and I are off to Hong Kong and Singapore to implement “wave 2” in a couple weeks. Thanks for all your help.*

*In terms of a broader application, I found FlexEngage most helpful as a change diagnostic framework. I can see this as part of a broader change management intervention or consulting project. Essentially, that’s what added the greatest value for us. When coupled with the facilitated meeting model, it was very powerful especially to help a team find common ground and level set.*