



CLI
CASE
STUDY

CASE STUDY OVERVIEW: Organizational Culture Review, Managing an Acquisition, and Creating a Strategic Plan

The Need

CLI was asked to aid in the cultural and tactical transition as a local engineering firm worked through an acquisition by a large national firm.

The client looked to CLI to facilitate a three-day offsite retreat and to deliver an organization-wide culture assessment.

The Corporate Learning Institute Approach

CLI worked with the engineering firm to complete a cultural assessment called the Denison Culture Survey. The survey was used to compare past and current organizational culture and to compare cultural differences between the corporate office and multiple satellite offices. At the three-day offsite retreat, CLI walked the leadership team through the Denison Culture Survey results and facilitated strategic conversations to begin to repair culture challenges.

CLI combined experiential learning activities, organizational culture and values, with presentations and break-out sessions led by internal leaders to create a three-day offsite retreat that facilitated strategic planning and focus for the firm. Challenges of an acquisition were discussed and "next steps" were outlined and assigned to work teams.

Post-program, CLI met with the client to review strategic plans and key learnings with the firm's leadership team.

Results

The client's leadership team left the offsite retreat with a sense of direction and motivation to work through the challenges of an acquisition as well as a focus on continuing to develop the firm's culture.

