

# International Accounting Firm: Creating One Cohesive Team Post-Merger



## Challenge

An accounting company was looking for a fresh start and common language after merging two firms. In 2017, the company identified three strategic pillars to refresh and renew their strategy. The pillars focused on individuals taking responsibility for themselves, ensuring high-quality products and solutions, and having greater collaboration with their clients.

The main goal was to change employees' mindsets and behaviors to become an industry market leader by 2020.

## Solution

The company launched a recurring two-day learning program stemming

from FranklinCovey's *The 7 Habits of Highly Effective People*®. The program allows employees from various locations to gather and learn about the *7 Habits*® to create one language, learn desired behaviors, and implement the mindsets needed to thrive personally and professionally.

Every employee in the company is encouraged to attend the program to ensure a common language throughout the entire organization. The programs are held at clients' locations to deepen relationships and ensure they feel like trusted, valued partners.

Over the course of a year, the employees participate in supplementary training that ties back to the *7 Habits* for continued

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application and sustainment. There is also regular feedback and reviews that focus on ensuring high-quality standards are met.

## Results

The results were immediate. Leadership is seeing a change in the employees' behaviors and how the *7 Habits* are positively impacting the bottom line.

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## About

This is an international accounting firm specializing in small to medium-size entities. It was founded two decades ago and focuses on the management of funds, trusts, and foundations.

### Industry

Accounting

### Number of Employees

1,001+

### Opportunity

An international accounting firm focuses on creating a cohesive team and common language after a merger. With the help of FranklinCovey's *The 7 Habits of Highly Effective People*, their employees' new mindsets and behaviors are positively impacting the bottom line.

### Solution

*7 Habits*® Signature 4.0



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