

A search to define ‘Heart & Soul’

The Situation

The client is Headway Emotional Health Services, a mid-size nonprofit organization with revenues of about \$5.5 million employing approximately 100 FTEs. The largest portion of revenues comes from service fees and contracts. The organization competes in the Twin Cities market in the broad category of mental health services that includes a wide range of entities that appear to offer similar services – larger and smaller; nonprofit, for profit; multi-site and solo practitioners.



After 40 years in business, the organization recently changed its name, logo and tagline to reflect better growth and change the organization had experienced. While that change went smoothly, the leadership team believed Headway was still not positioned for distinction in the crowded marketplace.

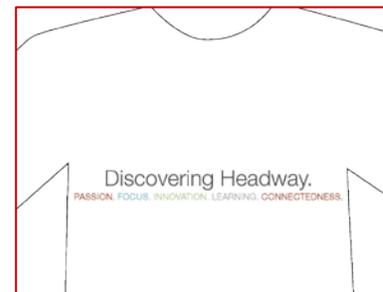
Kostik Associates was engaged to assist Headway in:

- Discovering the “heart and soul” that drives Headway success
- Defining this as a competitive advantage
- Using this lens to create and tell Headway’s unique story

The Approach

We assumed that product offerings and pricing would not be the key to market differentiation among mental health services providers. Most clients and prospective clients would not be able to or interested in comparing specific therapies or costs. We judged that how services are delivered could be a significant differentiating factor, and that led us to look first at the people delivering the service.

We chose to use a technique called Appreciative Inquiry to guide us through our search for the root cause of the organization’s success. Appreciate Inquiry is an approach to organization development that: is a cooperative search for the best in people, their organizations, and the world around them; involves the discovery of what gives life to a living system when it is most effective, alive and constructively capable; and is based on the assumption that every organization has something that works well. We titled the effort “Discovery Project.”



The Leadership Team selected a Discovery Project Core Team consisting of 11 employees representing a cross-section of the employee base. Selection criteria included diverse: job levels (manager to front line); job types (administrative assistant to therapist to finance); job location; and length of service.

The Core Team’s mission was to dive into the organization using a thoughtfully designed set of unconditionally positive interview questions for their co-workers, inviting them to share stories

about past and present achievements, high point moments, lived values & distinctive competencies.

Over the course of a month Core Team members conducted about 40 in-depth interviews, collecting over 1,100 bits of data – responses to specific questions and stories – that became the basis for the story to be told. Together we sorted and analyzed that data, identified themes, and used the language of employees to define the positive core of the organization and describe what employees see as defining the qualities they bring to their job on a daily basis.

The Results

The impact on market differentiation, market share and market penetration will not be known for some time. What we do know is that the organization now has language to describe five key dimensions of its workplace: Passion; Focus; Learning; Innovation; and Connectedness. This “discovery” became a significant resource for the organization’s strategic planning process, it has been incorporated into internal and external communications, and it is shaping how the organization recruits and selects new employees.

In Discovery II, the Core Team is conducting similar interviews with a group of external stakeholders to guide development of targeted marketing strategies and messages.