

# Case Study: Systems Conflict in a Corporate Environment

## Background & Context

The company in question was changing their financial reporting from a fairly lax financial model to a more stringent one. In the past, “overspends” in one area were countered by “under spends” in other areas. Variation was not considered a problem as long as the overall organization budget variation was within 10%. Because of the lack of process, the finance department would habitually produce monthly reports six weeks after the month end.

With the new system underway, the appointment of a new senior manager heralded increased focus on financial accountability. The change met resistance from middle management as it meant more accountability and less financial control for their group. After three months of limited success ProActive ReSolutions was approached to help solidify the process.

## The ProActive Response

ProActive was invited to conduct a Facilitated Dialogue for Solutions (FDfS) session with the involved parties.

ProActive conducted a series of preliminary fact finding discussions with the various parties involved. It was discovered that meetings set to review and discuss budget performance quickly descended to blame for poor financial reports, for the lack of transparency in budget preparation, and for the resulting lack of ownership for financial performance.

The goal of a FDfS session is to use the Dialogue for Solutions (DfS) structure to conduct a meeting and come out with a concrete action plan and delivery timeline. By using a ProActive facilitator, the meeting stays within the structure of the DfS model and on track for resolution. The DfS model involves five steps: gathering information about the issue,

## Standardized, Evidence-Based and Integrated Programs to Build Respectful Workplaces

ProActive ReSolutions is an internationally recognized leader in creating respectful workplaces and facilitating successful workplace conflict prevention and resolution strategies.

We offer a full range of integrated products to help prevent conflict, repair relationships that have been harmed by conflict, and protect people whose health and safety is threatened by conflict.

Our strength lies in our standardized, evidence-based and integrated programs coupled with our passionate experts drawn from a wide range of professions including employee relations, law, forensic psychology, media, restorative justice, social policy, policing and education.

identifying all problems and determining the “Primary Problem”, identifying possible solutions and coming up with a “Primary Solution”, identifying the actions needed to implement the “Primary Solution”, and finally, executing the agreed upon actions.

More specifically, for this company, DfS was being used to come up with a structured process to identify and prioritize ways to improve control over the budget process.

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Within this, all parties had to agree on the problems causing the budget process issues and then work towards a structured action plan that promoted accountability.

After all perspectives and opinions were considered, an agreed upon action plan was developed. Ownership was assigned for each step of the plan to ensure that there was no ambiguity upon execution.

## The Result

Within six months of the Facilitated Dialogue for Solutions meeting the budget had been prepared and approved by the Board. Obvious progress resulting from the meeting was noted in multiple arenas. On the part of finance, monthly reports became timely and accurate and more specific financial reports were revamped to be clearer and more relevant. On the part of the middle managers, training was provided on "Finance for Non-Financial Managers" which was well attended and well received.

The overall effect has been to give the middle management team a structured approach to making complex decisions by way of a structured action plan, in a way that ensures team commitment. Best of all, this is being achieved in a way that encourages a more respectful workplace environment.

## ProActive Products Used in This Case

Dialogue For Solutions (facilitated session) helps groups share information and arrive at decisions effectively. The ProActive facilitator involves all group members and ensures all contributions are heard. The process is particularly useful for complex or divisive issues. The discussion is clearly focused around gaining members' commitment to create and execute a clearly defined action plan.

To learn more about how to build respectful behaviour in the workplace, visit [www.proactive-resolutions.com](http://www.proactive-resolutions.com)