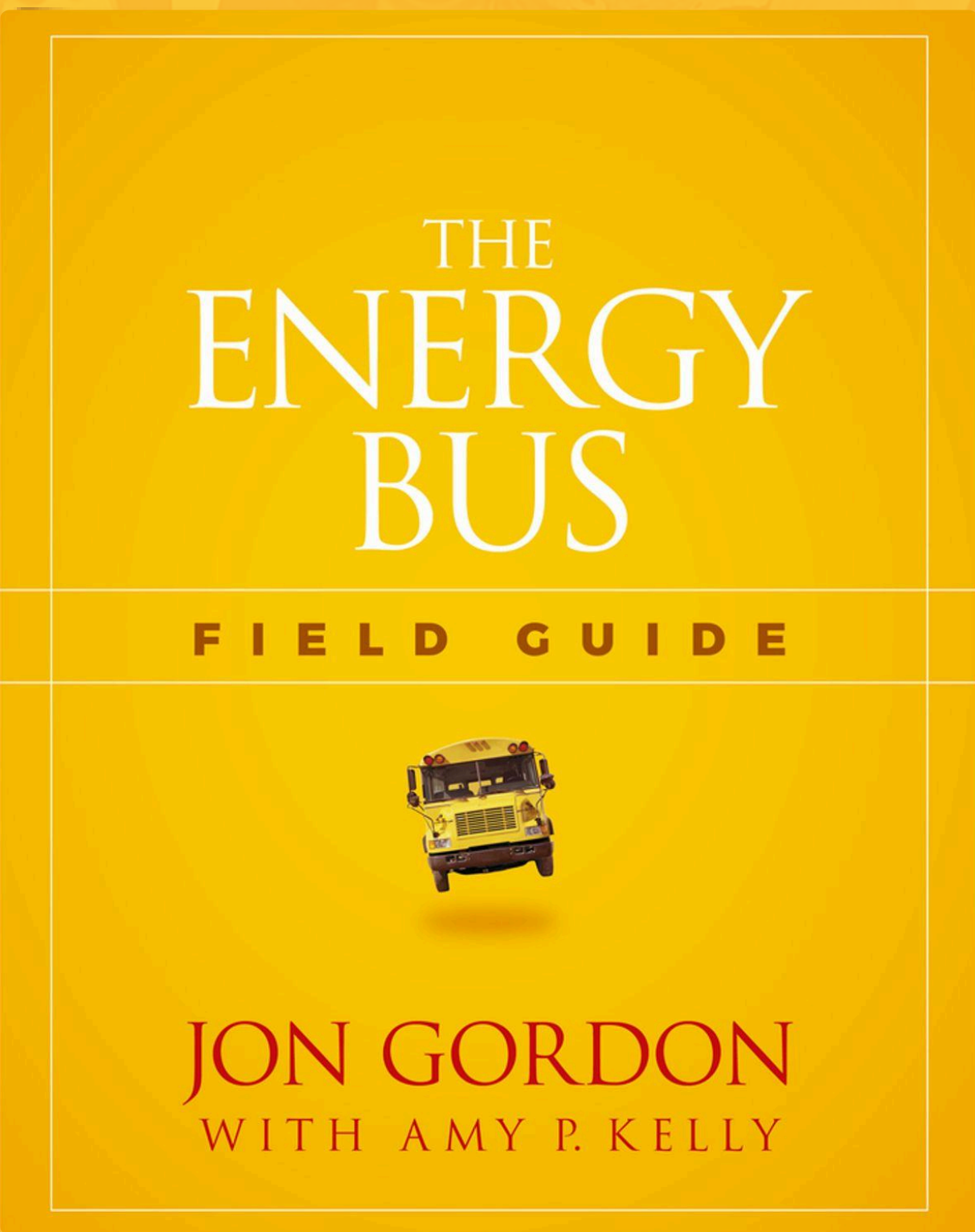
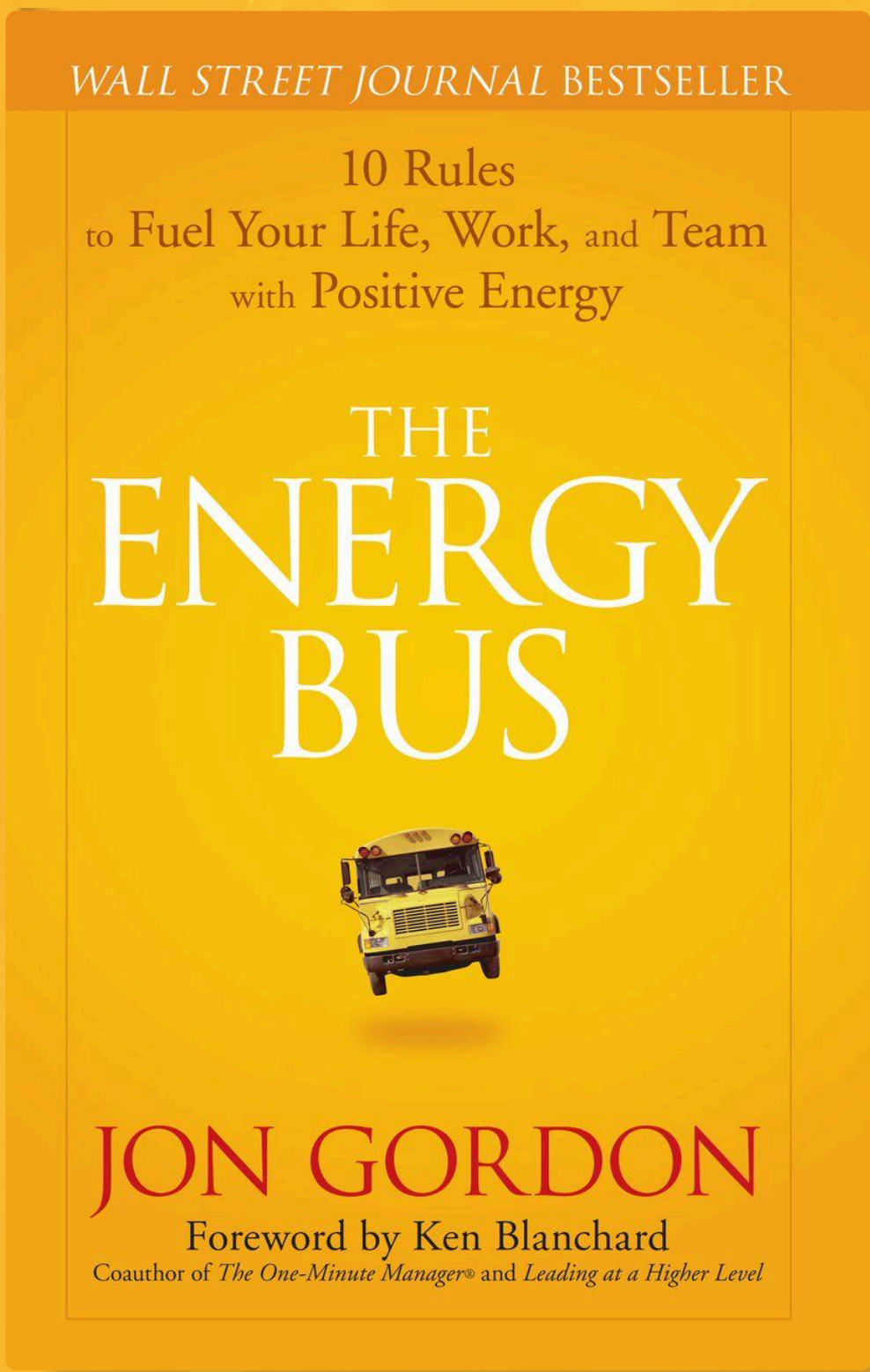


BUILDING A STRONGER CULTURE THROUGH POSITIVE LEADERSHIP

BlueStem Wealth Partners embarked on a transformational journey using *The Energy Bus* principles and *The Energy Bus Field Guide* to strengthen team culture, improve communication, and create a more positive, resilient workplace following a major organizational transition.



COMPANY NAME:

BLUESTEM WEALTH PARTNERS

PRIMARY CONTACT:

JILL LAWRENCE

ROLE:

CEO

PROGRAM:

THE ENERGY BUS

DATE:

JAN '24 – JUNE '25

⚠ THE CHALLENGE

As the organization began a transition from a broker dealer model to an independent firm, the BlueStem team experienced a demanding 18-month period that required significant problem-solving, perseverance, and operational change. While the transition ultimately strengthened the organization, it also exposed areas where the team needed stronger communication, healthier coping skills, and greater emotional awareness. *The Energy Bus* program was a key driver in the organization successfully navigating the demands during the transition.

Before BlueStem invested in *The Energy Bus* program, burnout, negativity, and inconsistent support among team members were impacting the culture. Some employees had not previously worked in professional team environments and were unaware of how personal behaviors and attitudes could affect others. Leadership recognized the need to rebuild a culture centered on positivity, accountability, and mutual support.

⊕ THE GOAL

BlueStem sought to create greater awareness around how individual behaviors influence team culture and organizational success. The goal was to establish clear expectations for communication, mindset, and accountability while helping team members heal from the stress and emotional strain caused by the transition.

Leadership also wanted to provide employees with practical tools to navigate negativity, improve relationships, strengthen teamwork, and grow both personally and professionally. Ultimately, the objective was to build a healthier culture that positively impacted the team, their families, and BlueStem's clients.

THE SOLUTION

The Energy Bus program was introduced through an immersive workshop led by Vice President of Consulting Amy P. Kelly, followed by a structured year-long culture initiative designed to reinforce the principles and associated resources throughout the organization. Some specific program elements included:

- ✓ Conducted an in-depth workshop focused on positive leadership and team culture.
- ✓ Helped leadership identify key cultural challenges and areas for growth.
- ✓ Created a customized 12-month implementation plan to sustain momentum.
- ✓ Provided ongoing encouragement, accountability, and support throughout the year.
- ✓ Equipped team members with practical tools to navigate negativity and improve communication.
- ✓ Reinforced shared expectations for behavior, accountability, and team support.

RESULTS ONE YEAR LATER

The impact of the initiative produced both measurable business outcomes and meaningful cultural transformation.



50%

Reduced time spent managing internal drama and negativity-related issues by 50%.



32%

Increased revenue growth by 32% following implementation.



\$1B+

Reached the milestone of managing more than \$1 billion in assets within two years of becoming independent.

- ✓ Achieved one of the firm's strongest years of new client asset growth.
- ✓ Created greater clarity and accountability while successfully reorganizing team roles and responsibilities during continued organizational change.
- ✓ Established the strongest and healthiest team culture in company history.



"The results are both measurable and immeasurable. Our team now understands what is expected of them and has the tools to work through negativity and move toward a positive mindset. We have stronger relationships, better communication, and the best culture we have ever had as a team."

— JILL LAWRENCE, CEO, BLUESTEM WEALTH PARTNERS

A PERSONAL IMPACT STORY SHARED BY THE CEO

We have a great story of how the principles from *The Energy Bus* program transformed one team member's life. After going through a divorce, living in her parents' basement with her two children, and struggling emotionally and financially, she identified 'Independence' as the vision for her future during the workshop.

Through support from her teammates, a renewed mindset, and clear goals, this team member was eventually able to purchase a home and move her family into a new chapter of life. Our Jon Gordon consultant later sent her a handwritten letter of encouragement and a housewarming gift. Today, this employee proudly displays the letter in her home and frequently shares how *The Energy Bus* principles helped change her life.