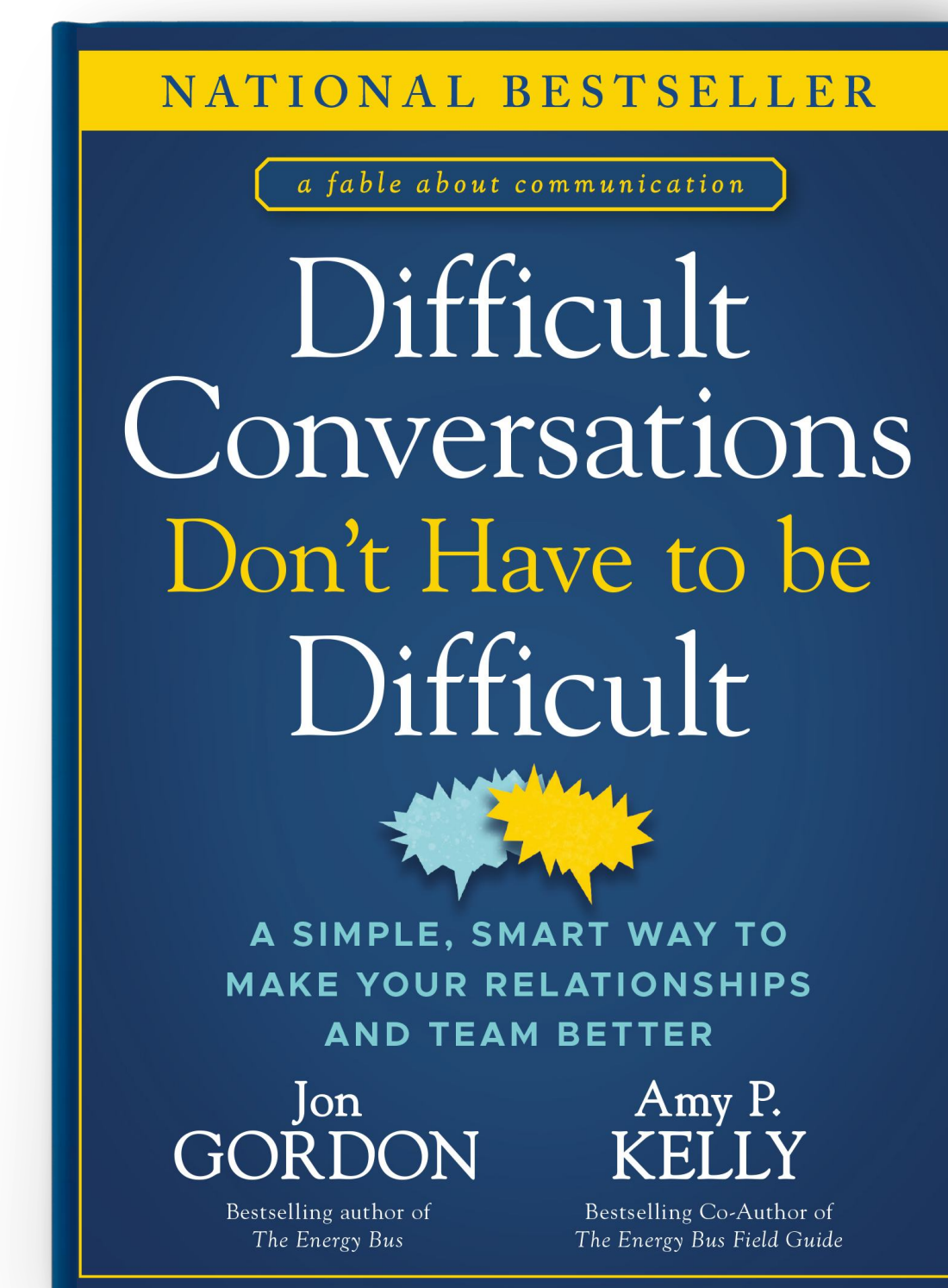


Have the conversations to get better. And, get better at having them.



BUILDING A UNIFIED CULTURE THROUGH STAR³

How One Top U.S. Wealth Management Institution Transformed Division into Collaboration

CLIENT OVERVIEW

Industry: Financial Services
Organization Size: National Institution (Top 5 in the U.S.)
Date of Engagement: 2024 - 2025

THE CHALLENGE

Two high-performing training groups—each with their own distinct methodologies and philosophies—were merged. While both teams brought valuable expertise, their differing approaches led to tension and mistrust.

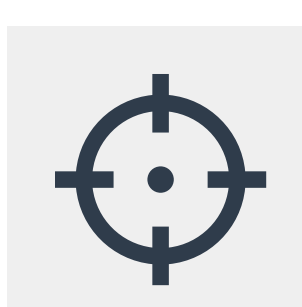
Symptoms of the fractured culture included:

- Disengagement on virtual calls
- Fragmented communications and side meetings
- A lack of energy and cohesion
- Absence of a shared culture and purpose

CLIENT REFLECTION

"Without the STAR³ Model, the team wouldn't have united into a championship team. The model is adaptable, impactful, and essential for rejuvenating any organization's culture."

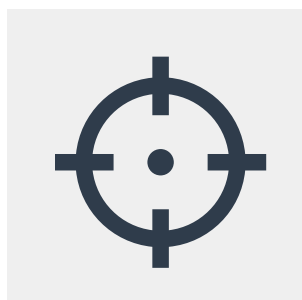
THE GOAL



Leverage the strengths and best practices of both training teams



Cultivate a culture based on positivity, relationship-building, and shared purpose



Lead through organizational change with clarity, trust, and energy



Create a common vision that inspires and unites the team

THE SOLUTION

The **STAR³** Model was introduced, blending cultural clarity with relationship-based leadership. Key actions included:

- Identifying shared **values, beliefs, and success stories**.
- Facilitating candid conversations to address '**elephants in the room**'.
- Co-creating team-specific **Rules of Engagement**.
- Introducing a “**No Energy Vampires**” commitment to preserve team focus.
- Launching a Culture Club, rotating leadership to promote **ownership, energy, and sustainability**.

RESULTS ONE YEAR LATER	
+30% increase in employee engagement scores	+32% productivity gains
✓ Surge in financial professionals participating in coaching and development programs	
✓ Stronger team brand and elevated revenue growth among participating professionals	

STAR³

S	SMALL EGO. BIG MISSION. WE > ME.
T	TELL THE TRUTH IN LOVE TO GET BETTER TOGETHER.
A	ASSUME POSITIVE INTENT. DO NOT TAKE IT PERSONALLY. MANAGE EMOTIONAL ENERGY. NO PERSONAL ATTACKS.
R ¹	RULES OF ENGAGEMENT. CREATE SPECIFIC RULES OF ENGAGEMENT FOR YOUR TEAM TO HAVE THE DIFFICULT CONVERSATIONS IN A POSITIVE WAY.
R ²	RESPECT YOUR TEAM AND THE PROCESS. TRUTH TOLD IN LOVE DEVELOPS RESPECT, AND RESPECT VALUES THE TRUTH.
R ³	RELATIONSHIPS MATTER MOST.