



## Business Challenge

### Industry: Credit Card Processing

ChargeItPro had been undergoing dramatic growth and wanted to take the company structure to the next stage, but CEO Phil Telesco knew they didn't have the tools they needed. Since relocating to Idaho in 2011 with five people, the company had doubled in size four years in a row, eventually growing to 50 employees by the end of 2016. During that five-year period, revenue grew by 45% each year.

The organization was experiencing a bevy of challenges, mostly as a result of the amount of growth it had experienced in such a short amount of time. Most significantly, the supporting structure of the company couldn't adequately sustain its growth. In many ways they were still operating like a small company—several initiatives were bottlenecked through the CEO, the staff had a lack of ownership, there were few written processes and procedures, and they didn't have an org chart. Because of this, roles and responsibilities were uncertain, as was engagement and accountability.

The CEO at ChargeItPro had done what many companies do when they have to bring on numerous employees, and was hiring on instinct, without any measurement of the job needs or the candidate's fit. The underdeveloped hiring system was especially problematic given that they were growing so quickly.

In much the same way, leaders had been promoted out of necessity, often landing in leadership roles without the training and development they needed to make that transition.

Also due to the growing pains, the company faced organizational health and culture challenges. Interpersonal conflicts existed at a variety of levels. They lacked set ways to organize around strengths, improve communication and reduce conflict. Leaders wanted help redefining the culture and improving overall satisfaction for employees.

Although ChargeItPro had good financial success to that point, the intrinsic side of things was lacking.

In the

### Client's Words

*"We were just hiring on instinct."*

-Tai Telesco –Marketing Director

# Solution

Price Associates started by interviewing the team and defining the needs of the organization. This gave the CEO and the leadership team clarity around where the organization was at, measuring both qualitative and quantitative dimensions.

Leadership Advisor and Executive Coach Ron Price took leaders through Stages of Growth and completed a SWOT Analysis as part of the preliminary assessment. Leadership and Organizational Coach Andy Johnson worked with Ron to conduct interviews with the staff and reviewed the findings with the company owners. Andy then began working with the leadership team, teaching them about the concepts of healthy teams and helping to resolve interpersonal conflict. He also had the team complete DISC and Motivators Assessments, which led to a shift in the way they worked together after seeing the results.

Ron conducted a two-day workshop on continuous improvement and quality. Afterward, Andy continued working with the employees on continuous quality improvement efforts, supporting ChargeItPro at a variety of levels and becoming an entrenched member of the team.



To accomplish its goals, the company determined it needed a trusted advisor relationship that delivered assistance in all different levels of the organization. Andy completed job benchmarking for each role at the company, generating a map of success for each job that created clarity in both delivery and performance management. He also benchmarked new roles as they were added to the growing company and assisted with the hiring process. This work provided long-standing role clarity, a focus of the key results of each job, and ultimately a better understanding of how each person's role fit together to create the bigger picture.

**"Andy became one of us, it was incredible. The time and energy he gave to us, the amount of work was overwhelming. I would definitely say hire these guys because they will do everything they say they will do and more."**

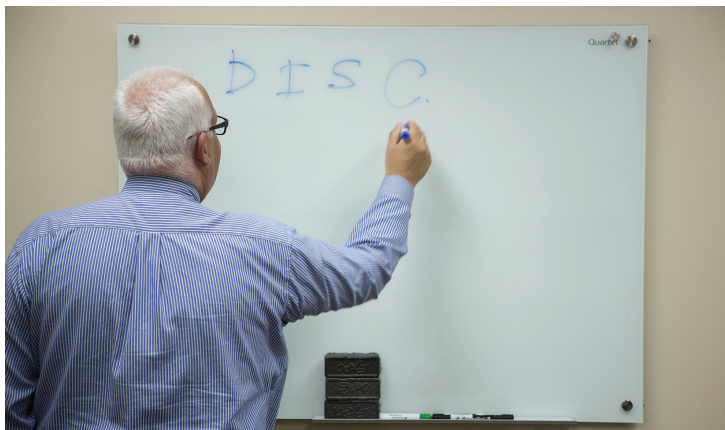
**—Phil Telesco, President and CEO**





Acting as an advisor and sounding board for CEO Phil Telesco for decisions made throughout the organization, Andy ultimately functioned as the Chief Culture Officer, and helped outline cultural goals and the steps needed to get there. He trained the leadership team on the Healthy Team Model (from *Pushing Back Entropy*) working with them on communication, character, and clarity. The team also explored the questions: “Why do we exist?” and “What are the values?” which lead to shifts in teamwork and team health.

Andy also helped nurture the leadership team, including one-on-one leadership coaching; weekly meetings covering team, organizational, and culture topics; and offsite leadership retreats to work on vision, values, and strategy.



Andy’s experience as a professional counselor was beneficial as interpersonal conflict resolution and mediation issues arose. He lead workshops for the entire staff on DISC, motivators, acumen capacity, stress quotient and process improvement assessments—breaking down results and teaching teams how to work more effectively with one another based on outcomes.

## Andy’s experience as a professional counselor was beneficial for mediation.

Andy was so embedded in the company that he even played the role of interim HR for a number of months, helping to hire the new HR director. He shepherded a bevy of organizational planning and development initiatives, even assisting in the creation of the first employee handbook.

When the company was purchased, he also helped with negotiations related to the sale.

## In the Client’s Words

Tai Telesco –Marketing Director

### Personal Growth

*“He helped us become not only a better team, but also better managers and better people.”*

### Leadership Team

*“Andy was instrumental to the formation of a leadership team to address these issues. We had a biweekly meeting where we could come together and discuss best practices and improve our skills as managers.”*

### DISC Assessment

*“The DISC assessment was immensely helpful. When we started, we didn’t even have job descriptions, but with their help we were able to easily see what kind of skills and aptitude candidates needed.”*



# Results

One of the most significant outcomes was reduced stress for the CEO. By providing Phil with the support he needed to shift his company culture and giving him a partner on the journey, Andy helped shoulder the weight. Andy was a trusted advisor who had knowledge of the tools ChargeltPro needed and experience with the situations the company was facing—and ultimately became an engrained consultant who helped with diverse needs across the company.

## One of the most significant outcomes was reduced stress for the CEO.

ChargeltPro experienced a radical cultural transformation, beginning at the top with the CEO and the leadership team, who learned to communicate better and effectively interact with one another—impacting each department in turn. The health of the culture also greatly improved. There was a measurable reduction in interpersonal conflict and a vast improvement in healthy communication across departments. Phil reported that one of the biggest

**“Andy’s work had an impact on all of our employees. It made them better managers and people, not just when it came to the company.” Phil Telesco**

shifts occurred in coworker relationships. He felt that Andy’s help to change pervasive behavioral habits created a change in morale that could be seen throughout the company.

Andy’s work to guide the leadership team through strategic development sessions increased the feeling of employee ownership across the company. It also resulted in the personal and professional development of these leaders.



By utilizing job benchmarking and assessments, ChargeltPro saw the development of a clear and measurable hiring process, resulting in better hires, improved job fit and less turnover. These tools also improved role clarity, goal setting and employee performance.

The organizational development of the company finally caught up with ChargeltPro’s growth. They developed a solid set of policies and procedures, including the supplemental documents needed to sustain them, such as org charts and an employee handbook.

The leadership team worked with Andy to create a set of relevant values, and implemented the application of these values to the culture. In the end, the company had better clarity around its vision and ideals.

After its work with Price Associates, ChargeltPro attributes increases in both the top and bottom line, increased profitability, and ultimately tripling the valuation of the company prior to its sale.