

## WELLBEING (WB) JOURNEY - CASE STUDY



### Jennifer Smith - Banking Institution VP Fintech Partnerships,

Jennifer leads the high profile fintech partnership development team and is considered a high potential manager.

*“The journey allowed me to reflect on how to embed wellbeing into today’s most relevant work and meaningful practices.”*

During an **Organisational Review** (1-hour) with her Learning Coach, Jennifer explained that her team had been voicing concerns about ongoing work pressure and feeling overwhelmed, with no calmer period in sight. In addition, a previously high performing team member would be returning back to work after a partial burn-out and she wanted to ensure that the high workload would not undermine his recovery. Her Learning Coach, suggested she complete a **Learning Adventure** Drivers of Change for Team Wellbeing, which would help her to reflect on corporate wellbeing.

**Development Review** (1-hour): The **Learning Adventure** had helped Jennifer visualise the corporate wellbeing journey experience and how it could assist her and her team both on a professional and personal level. She spent part of the session clarifying the desired organisational impact, such as increased team resilience, engagement and productivity and then focused on the change required, both in terms of change in team members’ behaviours and in systems, processes and practices. Once she received approval, Jennifer and her Learning Coach co-created the Team Wellbeing **Development Journey** outline that she would embark on with her team.

**Development Journey Design and Implementation:** The Learning Journey included a review of the team’s competencies, roles and responsibilities followed by an assessment of the systems / practices currently in place. This laid the foundation for integrating wellbeing into the work design for the whole team and creating a safe space where wellbeing conversations and check-ins would become regular practice. Jennifer and her team then focused on exploring their own stressors and boundaries. The journey took approximately 4 months in all with team involved in creating a wellbeing centred work culture. Jennifer’s Learning coach suggested the following Learning Adventures, supported by individual and team coaching sessions.

**Weeks 1-5: Situational Assessment & Self Reflection Learning Adventures:** Wellbeing purpose, Map of the terrain, Impact of own behaviour, Personal Readiness

**Weeks 6-10: Preparing the Team Learning Adventures:** Leading the team, Team fitness and Tools for the Journey, Having Wellbeing conversations

**Weeks 11-16: Preparing the Team Learning Adventures:** Leading the team, Team fitness and Tools for the Journey, Having Wellbeing conversations

**Programme evaluation:** The evaluation of the programme highlighted how the team was better able to deal with stressors and deadlines due to the planning, thinking and wellbeing spaces that had been built into every-day work practices. The result was greater trust and respect, stronger teamwork and the agility and creativity to deal with an increasingly disruptive external environment. The programme had succeeded on both a professional and personal level.

*“Having my Learning Coach’s support during the self-assessment journey encouraged me to be honest with myself on where my team and I had the opportunities and choices to introduce healthier working practices and attitudes. He helped me map out the journey, supported my team and I along the way and was always there with relevant guidance when facing confronting decisions”*

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<sup>1</sup>The case study is fictional but based on an actual programme

