



PI Worldwide

Case Study: Plunkett Cooney

Initiating Change in a Tradition-Steeped Culture



After implementing the PI® system:

- Significant improvements in **decision-making, efficiency, and training.**
- **Better understanding** of how the organization is impacted by **employees' innate behaviors** during a **time of change.**

“ The Predictive Index® system is a **competitive advantage** for us. I believe it **differentiates us in the market** because it has created a common language and brought people closer together to do good work. **PI has changed how we work.** ”

Denise Boucke,
Director of HR,
Plunkett Cooney

THE CLIENT

Plunkett Cooney, one of the largest and most accomplished litigation and trial firms in the Midwest, consists of more than 165 lawyers across a network of 11 offices.

THE OPPORTUNITY

Plunkett Cooney has long believed that the secret to its decades of success is its people, and that cultivating an environment that empowers employees across job functions to work cohesively is the key to delivering exceptional customer service. When they were preparing to implement a significant corporate-wide “paperlite” initiative, CEO Hank Cooney recognized that the change could have a significant impact on the organization’s productivity and overall culture. He believed that in order for the new tools and processes to be adopted successfully, the management team needed to understand the organizational impact of employees’ innate behaviors overall, and then examine how they would exhibit during a time of change.

THE SOLUTION

Plunkett Cooney decided to use the Predictive Index behavioral assessment from PI Worldwide to identify the motivations and drives of its people at the individual, team and organizational levels. Working with PI Worldwide Member firm ADVISA, the Plunkett Cooney management team took part in the Predictive Index Management Workshop™ to learn how to expertly interpret individual PI assessment results and employ the companion job analytics tool, the PRO™, to define the behavioral requirements for various job functions. Then the entire firm completed PI assessments. Director of HR, Denise Boucke, said that although she encountered some initial skepticism, employees were “blown away” by the accuracy of their PI feedback, saying such things as, “it’s right on — this is so me.”

Looking at the initial results, Boucke noticed fundamentally different PI profiles for attorneys and legal secretaries — the two largest employee populations that work very closely together. Attorneys had very high levels of dominance and extraversion, and low levels of patience. Legal secretaries tended to be more team-oriented and collaborative with lower levels of extraversion but higher levels of patience.

Attorneys used this information to meet one-on-one with their administrative counterparts to discuss how these differences, similarities, and behaviors manifest in the workplace. For many, this was an eye-opening exercise and several employees reported that the process helped stimulate important discussions. In addition to aiding collaboration, the PI profiles helped Plunkett Cooney identify the ideal candidate for the legal secretary role as someone who can operate with structure, stability, and patience.

An additional and important finding from the PI assessments was that the one common behavioral trait of all employees across the organization, regardless of position, was the need for structure and rules. Recognizing that most of their population was risk-averse and needed a lot of information to be comfortable, management had to rethink how they communicated, trained, and even lead within the organization.

“ Our PI initiative was really about understanding how people work, **changing some behaviors to better address client service issues** and, ultimately, operating as the innovative firm that we really are. ”

Hank Cooney,
CEO,
Plunkett Cooney

Using the PI system, we were able to **really break down, identify, and articulate what behaviors** were contributing to discord or potential personality conflicts. In this way, **PI helped to guide our strategic personnel initiatives beyond just hiring.**

Denise Boucke,
Director of HR,
Plunkett Cooney

MANAGING CHANGE IN A RISK-AVERSE ENVIRONMENT

Plunkett Cooney used the information from the PI assessments, and the knowledge that the group tended to be risk-averse and information dependent, to begin planning the change from a traditionally paper-based, hard-copy, multiple-print-out type environment to “paperlite” processes and tools. To accomplish this ambitious overhaul, management needed employees to understand the program benefits and cooperate with new rules and deadlines – a change that, as the PI assessments revealed, contrasted with the natural tendencies of most people in the organization.

To introduce, prepare and transition employees effectively during this time, Plunkett Cooney and ADVISA had employees participate in “change” scenarios to determine if their responses (i.e., the way they process information) were socially motivated or task-driven. Based on this exercise, the firm established two groups — one social-focused and the other task-focused — and tailored their rollout strategy to how those groups received and processed change. Plunkett Cooney then created small work groups based on common PI types and mixed positions to “pilot” the various technology initiatives before a firm-wide rollout.

Since successfully implementing the Predictive Index system to support their strategic initiatives, Plunkett Cooney has continued with the working group concept, taking the focus of sharing ideas to improve workplace practices even further. Today, if conflicts do arise, Boucke and her team turn to the Predictive Index to help work through issues.

THE RESULTS

- Plunkett Cooney publicly **recognized for their people practices** through local awards.
- Significant improvements in decision-making, efficiency, and training.
- Better understanding of how the **organization is impacted** by employees’ innate behaviors **during a time of change**.
- **Conflicts frequently managed using PI profiles**, encouraging employees to “manage to the needs of the other PI.”



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