

CASE STUDY**Transforming Conversations:**

How SAVIA Leadership™ Used Whole Brain® Thinking to Revolutionize Leadership and Management Practices at Upright (Formerly Fund That Flip)

**Summary**

“The plan was to work with SAVIA to introduce Whole Brain® Thinking to the organization without causing disruption,” Sullivan says, “We could dip our toe in and start to have people understand the power of it through the leadership development program, and then from there, as interest grew, we would expand it within teams.”

SAVIA Leadership, a global leadership development firm, played a pivotal role in helping Upright (formerly Fund That Flip), one of the fastest-growing real estate fintech companies in the United States, integrate Whole Brain® Thinking into its leadership and management practices, fostering unprecedented growth within the organization.

Upright successfully introduced the Herrmann Brain Dominance Instrument® (HBDI®) to managers on an opt-in basis, with participation spreading over time and eventually reaching a majority of the workforce.

This transformative initiative not only enhanced self-awareness and communication but also fostered a culture of inclusivity and understanding within the organization.

Upright, experiencing rapid growth with a surge in new managers and leaders, recognized the imperative need for leadership development that was practical and immediately applicable. The solution lay in SAVIA Leadership’s expertise, which utilizes the HBDI® assessment as a foundational tool in their leadership development programs to leverage Whole Brain® Thinking.

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For decades, SAVIA Leadership has delivered high-impact programs, including High-Powered Team Development, Essential Skills for Managers (ESM) training, and executive coaching, to help employees and teams transform their communication, work more effectively together, and tackle their most ambitious goals from a position of alignment and synergy. SAVIA utilizes the HBDI®, a thinking styles assessment tool based on decades of neuroscience research, to teach people to understand their own preferred thinking style and then quickly apply it to how they can improve their effectiveness in communicating and listening to others.

Kimberly Sullivan, Upright's former vice president of people, understood the value of the HBDI® and Whole Brain® Thinking. As a participant of SAVIA's ESM cohort in 2020, she knew firsthand the validity and proven success of the program.

Sullivan saw an opportunity to introduce the concepts into the organization more widely. "The plan was to work with SAVIA to introduce Whole Brain® Thinking to the organization without causing disruption," Sullivan says, "We could dip our toe in and start to have people understand the power of it through the leadership development program, and then from there, as interest grew, we would expand it within teams."



"Thank you! The trainings contributed significantly to my growth as a leader by giving me a toolkit I can put to use each day as well as giving me a broader understanding of how to engage with people who have different thinking styles."

Jon G.
Head of Data & Analytics





Objectives

Upright's objective was to empower its leaders to understand themselves and their teams better while introducing a common language for more effective communication. The company was also looking for a people manager training program for its influx of new managers who needed fundamental leadership development tools, which would:

Empower them to communicate with greater influence and skill

Help them learn how to delegate, hold people accountable, and manage their stress more effectively

Provide a toolbox of skills, and mindsets, along with the confidence to apply them to their work successfully



Challenges

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Upright wanted to build self-awareness in its leaders and managers so they could better understand themselves and their people. “Without awareness, you don't have access — access to understanding yourself, how you're showing up for others, and even what changes you want to make,” says Mike Jaffe, SAVIA Leadership's president and founder. “It can be challenging to take a look at oneself and take action to change what is not working.”

Sullivan also wanted to create buy-in for the program and avoid resistance among the workforce. Knowing the HBDI® wouldn't be mandatory, even for senior leadership, the company had to rely on positive reactions and word of mouth rather than compliance. Additionally, the programs would have to be able to scale quickly as Upright was growing and introducing many new leaders to the organization.



Solutions

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The engagement with SAVIA Leadership was a jumping-off point for introducing Whole Brain® Thinking as part of the training experienced by leaders and managers. Emphasizing self-awareness was a natural connection point. “There isn’t a one-size-fits-all for what leadership is. Everyone’s team is different. Everyone’s team members are different,” Sullivan says.

SAVIA began by rolling out its High-Powered Teams program at the leadership level. Upright made participation optional, hoping to inspire bottom-up adoption. The HBDI® was introduced to leaders first so they could experience the benefits and then evangelize the assessment among their teams. “We used the HBDI® to install Whole Brain® Thinking as a framework to provide deeper insights into the team’s thinking preferences, dynamics, blind spots, and opportunities for alignment and understanding,” says Jaffe. “We began with an initial two-day Kickoff focusing on trust building, team unification, cohesion, values/ rules of engagement definition and clarity, to develop a more profound understanding of one another.”

“Then occurring each quarter for the year, offsites (or virtual team meetings) deepen the learning from the initial kickoff, build new skills, fortify trust, and create sustained accountability. These sessions include a combination of experiential learning, team dynamics, trust-building, and working sessions. We also offer the Team Effectiveness Dashboard (TED)¹, a survey that provides a clear picture of your team’s effectiveness across five key

dimensions, including which areas most need attention,” Jaffe explains.

“From the first team debrief, we noticed a difference. Seeing those eyes light up and people having ‘ahas’ about why they work differently than one of their team members and seeing those past conflicts and frustrations becoming more of an understanding that we’re all different — those are really exciting moments.” Sullivan says. Word quickly spread, and leaders wanted to bring this work to their teams. The rollout of the ESM program, only six months after the introduction of Whole Brain® Thinking to Upright’s leadership, marked a crucial milestone of buy-in. The ESM program equips managers with the necessary knowledge, tools, and mindsets to effectively manage their people to create a high-performing team.

By integrating the HBDI® and Whole Brain® Thinking methodologies with reflective exercises, and experiential learning, participants expanded their confidence in their own thought leadership as well as in leading their team to build trust, motivate action, and have more substantial alignment around shared goals and objectives. “Throughout the program, individual action plans and peer mentoring will support participants in applying what they’ve learned, extending long after the program concludes,” Jaffe explains. “Our workshops are customized, so participants gain practical experience by using their learning to company-relevant scenarios and case studies.”

¹The Team Effectiveness Survey, Whole Brain® Thinking, and the HBDI® are services of Herrmann, International.



Results

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The integration of HBDI® and Whole Brain® Thinking within the leadership development program yielded immediate recognition of its practical and powerful application in the workplace.

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Employee buy-in was strong, driven by word of mouth and the perceived value of the program. In fact, 95% of survey respondents said they would recommend the program to a colleague. The majority of Upright’s workforce has since taken the HBDI® assessment, and Whole Brain® Thinking has become an integral part of the company’s culture.

Whole Brain® Thinking at Upright is not a one-time exercise but a cultural transformation. It has introduced a common language that celebrates differences and assists in navigating diverse thinking perspectives. The HBDI® is used in various situations at Upright, including company events, onboarding, and people transitioning to another team, resulting in an organization that increasingly appreciates and leverages cognitive diversity.

The network effect of Whole Brain® Thinking is apparent, as the more individuals participate,

the greater the value for the entire organization. Whole Brain® Thinking, with its use of colors and quadrants, has made managing, understanding people, and fostering meaningful conversations significantly easier.

“Management’s hard, understanding people is hard, getting to know people is hard,” Sullivan adds. “The common language that Whole Brain® Thinking provides through the HBDI® has transformed conversations at Upright, strengthening our ability to work together to tackle the more difficult challenges.”

The successful partnership between SAVIA Leadership and Upright demonstrates that Whole Brain® Thinking isn’t just an abstract concept but is a practical tool that can reshape organizational culture, enhance leadership, and empower managers to reach their full potential as leaders.

The measurable results, as evidenced by unanimous buy-in, enhanced communication, heightened self-awareness, and conflict reduction, firmly demonstrate the effectiveness of SAVIA’s programming utilizing the integration of the HBDI® and Whole Brain® Thinking in cultivating skilled managers and high-performing teams. It’s a testament to the powerful impact of applying Whole Brain® Thinking in modern leadership development.