

CASE STUDY

Concord Servicing

From Stagnant to Adaptive: Rebuilding Enterprise Capability After Two Transformations That Did Not Stick

INDUSTRY	SERVICES USED	ENGAGEMENT MODEL
Financial Services (Timeshare Loan Servicing)	ADAPT© Learning Program Capability Accelerators	Multi-Cohort 18-Week ADAPT© Program

“At Concord, we had become stagnant in our ways. The Helix Group team came in and helped shape our organization to be more agile and process business requests more efficiently. More so than any of that, it was a great learning experience that helped push me forward as a developer; I still adhere to a lot of the concepts today.” — Kyle McAdams, Concord Servicing

Executive Summary

Concord Servicing is a financial services organization operating in the timeshare loan servicing industry. The company had previously undertaken both an Agile transformation and a DevOps transformation. Three years after both initiatives, neither had produced lasting organizational change. Process inefficiencies remained. Business requests accumulated. The ways of working that the transformations had been designed to change were largely intact.

The competitive threat that prompted renewed action was not dramatic. A small startup had entered Concord’s market and won one of their smallest clients. Concord was not alarmed. Then the startup was discovered in conversations with some of Concord’s largest clients. That was a different matter entirely.

Concord’s CIO engaged The Helix Group to restart the capability-building work and to approach it differently this time. The engagement that followed was not another framework adoption or toolchain rollout. It was a structured, immersive, cohort-based capability-building program — the ADAPT© program — that combined organizational culture diagnostics, root cause analysis, and employee-led implementation to produce change that the previous two transformations had not.

4	40–48	18	\$1M+
Cohort Groups	Employees Engaged (incl. CEO & CIO)	Weeks: End-to-End	Waste Eliminated (first VSM cycle)

The Situation

Two transformations. Neither one stuck.

Concord Servicing had made the investments most organizations make when they recognize that their ways of working are not keeping pace with the demands on the business: they brought in Agile. Then they brought in DevOps. They ran the programs, trained the people, and installed the frameworks.

Three years later, the organization was measuring the results. Neither transformation had fundamentally changed how Concord operated. Business requests moved through the system at roughly the same pace as before. The same friction points that had existed before the Agile program still existed. The DevOps initiative had improved some technical practices but had not changed the organizational culture or the cross-functional collaboration that DevOps is ultimately designed to produce.

This is the pattern The Helix Group refers to as Capability Theater: the ceremonies, certifications, and frameworks were adopted, but the underlying organizational capability — the ability to sense change, respond at speed, and continuously improve — was not built. Concord had the artifacts of transformation without the transformation itself.

The competitive signal that changed the calculus.

A startup had entered the timeshare loan servicing industry. Initially it posed no serious threat — it had won only one of Concord's smaller clients, and that fact did not generate significant concern at the leadership level.

Then Concord discovered that the same startup was in active discussions with several of their larger clients. The signal changed everything. What had looked like a minor market entry was revealing itself as a genuine competitive threat to accounts that mattered. A competitor that could move more nimbly, respond to clients faster, and offer a more adaptive service model was demonstrating exactly the kind of organizational agility that Concord's two previous transformation programs had been intended to build.

The CIO recognized that the organization needed a different approach — not another framework rollout, but a genuine capability-building program that would address the organizational culture and behaviors that were preventing Concord from becoming the adaptive, high-performance organization the competitive environment now required.

The Challenge

When Concord's CIO encountered a presentation on the ADAPT© program, the core argument resonated immediately: that sustainable transformation requires building genuine organizational capability — not adopting a framework and hoping the culture follows. The CIO requested a presentation to Concord's senior leadership team and made the case for moving forward with ADAPT©.

The challenge The Helix Group had to address was not simply a capability gap. It was the specific challenge of re-engaging an organization that had already been through two transformation programs and had seen limited results. That history creates a particular kind of organizational skepticism — one that cannot be resolved by presenting another framework or promising another set of tools.

The engagement would need to:

- Diagnose the actual state of the organization's culture and behaviors, not assume it
- Give employees genuine ownership of the change, not hand them a prescribed solution
- Produce measurable results that would demonstrate to a skeptical organization that this approach was different
- Build the internal capability for continuous improvement — so the change would compound after the engagement closed, not reverse

The Approach

The Helix Group designed an 18-week ADAPT© program organized into three six-week phases. Four cohort groups of 10 to 12 employees each were drawn from a cross-section of the company — including, critically, the CEO and CIO. Each cohort met in two one-hour sessions per week throughout the program.

The session structure was consistent across all cohorts: the first session each week involved assigned readings followed by a facilitated discussion; the second session involved a structured exercise followed by a debrief on what the cohort had learned, their key takeaways, and how those insights could be applied inside Concord. Every session was designed to connect learning to real organizational context, not to abstract frameworks.

PHASE 1

Weeks 1–6: Organizational Diagnosis & Immersive Learning

During the first six weeks, cohorts engaged in immersive ADAPT© learning while two structured organizational diagnostics ran simultaneously across the entire organization.

Westrum Organizational Culture Assessment

The Westrum model assesses organizational culture across a spectrum from Pathological (power-oriented) to Bureaucratic (rule-oriented) to Generative (performance-oriented). The assessment was administered organization-wide — not as a leadership survey, but as a diagnostic tool that would surface the actual cultural conditions at every level of Concord.

Force Field Analysis

Each cohort conducted a facilitated Force Field Analysis session, mapping the forces inside Concord that were working in favor of transformation and the forces working against it. This produced a structured picture of the organizational dynamics that any change initiative at Concord would need to navigate — from the bottom up, not the top down.

Alignment and Identification of Improvement Areas

The results of the Westrum assessment and the Force Field Analysis were overlaid and aligned by The Helix Group, producing a prioritized map of internal and external areas that needed improvement. This was not a list handed down to the organization — it was a diagnostic output that reflected what Concord's own people had identified, validated by the cultural assessment data.

At the end of Phase 1, each cohort was presented with the improvement areas identified from the combined diagnostics and asked to select one to own. The choice was theirs.

PHASE 2

Weeks 7–12: Root Cause Analysis & Solution Design

For the next six weeks, each cohort owned a specific improvement area and worked through a structured process to understand it deeply enough to design a real solution.

- Each cohort conducted root cause analysis to identify the underlying drivers of their chosen improvement area — not the surface symptoms, but the actual organizational, structural, or behavioral causes
- Cohorts developed a detailed, data-driven plan to address the root causes they had identified
- Plans were required to be evidence-based: every recommendation had to be grounded in data gathered inside Concord, not imported from an external playbook

The Presentation Event

At the end of Phase 2, all four cohorts presented their plans to the entire company. The executive team served as judges, evaluating the rigor, feasibility, and organizational impact of each proposal. The session ran long — the executives spent a late evening deliberating.

The outcome was not what anyone had anticipated: instead of selecting the best single proposal, the executive team chose to implement all four.

PHASE 3

Weeks 13–18: Implementation with Executive Sponsorship

Each cohort moved into implementation of their plan. Every team was assigned an executive sponsor whose role was specifically defined: clear impediments, act as a sounding board, and provide access to any information the cohort needed to execute.

This is the executive sponsor structure that The Helix Group's Change Management learning path describes as essential but rarely defined in practice — specific accountability, specific authority, and active involvement, not ceremonial endorsement on a kick-off slide.

What the Cohorts Built

The four cohort projects addressed distinct capability domains across the organization, each targeting a root cause identified through the Phase 1 diagnostics.

Technical Debt Reduction: SonarQube Implementation

One cohort tackled the organization's accumulated technical debt by implementing SonarQube — a static code analysis platform that makes code quality visible, measurable, and actionable. This was not

a vendor recommendation imposed on the team; it was a solution the cohort designed in response to root causes they had identified in their own codebase and development practices.

Sales and Engineering Alignment: Sales Engineer Roles

A second cohort identified a structural disconnect between Concord's sales function and its software development strategy. When the sales team was selling capabilities that the development team had not aligned on — or committing to timelines that development could not meet — the result was client expectation gaps and internal friction.

The cohort's solution was the creation of Sales Engineer positions: roles designed to bridge the gap between what the sales team was committing to customers and what the development team was actually building. The strategic alignment between sales and software development strategy was a gap that had not been visible as a structural problem until the root cause analysis surfaced it.

Product Structure Transition

A third cohort was charged with beginning the transition toward a product-based organizational structure. As the ADAPT© Product learning path makes clear, moving to a product organization requires more than renaming teams — it requires changes to architecture, funding models, workforce design, and business-technology synchronization. This cohort began laying that foundation, designing the operating model changes that would allow Concord to manage its technology as products rather than projects.

Strategic Alignment: Value Stream Mapping & Process Improvement

The fourth cohort, sponsored directly by Concord's CEO, was chartered with strategic alignment — the connection between Concord's strategic priorities and how work actually flowed through the organization. The CEO's personal sponsorship of this team was not coincidental: strategic alignment is the dimension of transformation that most requires active executive ownership, not just executive endorsement.

This team applied value stream mapping to make the flow of work visible — and waste explicit. Using Flashbuilds and 20-Day Challenges (structured rapid-improvement events adapted from the ADAPT© toolkit), the team moved from current-state to future-state value stream design. The result of their first future-state value stream map was the identification and elimination of more than one million dollars in organizational waste.

The elimination of over \$1 million in waste from a single future-state value stream map is the kind of result that distinguishes genuine capability building from Capability Theater. It is not a byproduct of a framework adoption. It is what happens when an organization builds the diagnostic and analytical capability to see its own waste — and the organizational will to eliminate it.

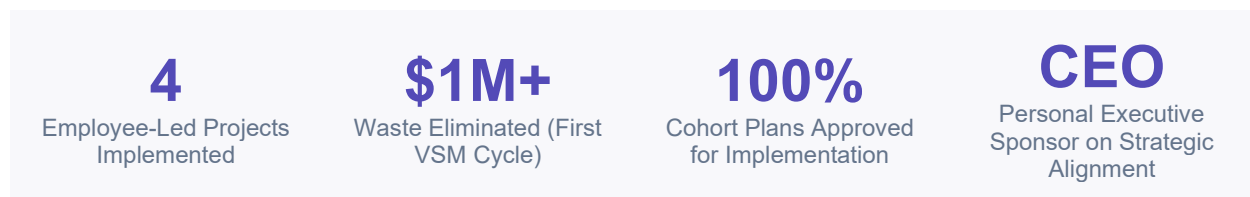
What Happened After the Engagement

The most meaningful outcome of the Concord engagement was not what happened during the 18 weeks of the program. It was what happened after.

Once the four cohort teams began implementing their projects, something shifted in the organization. Employees who had not been part of the initial cohorts began identifying other areas from the diagnostic work that needed improvement — and began acting on them. They brought other colleagues into the process. The improvement work that had been initiated by the four cohorts became self-sustaining organizational behavior.

This is the outcome that the ADAPT© program is specifically designed to produce: not a dependency on The Helix Group to continue running the transformation, but an organization that has built the internal capability to own its own change. Concord's employees took the transformation and ran with it — which is the only kind of transformation that lasts.

Outcomes at a Glance



CAPABILITY DOMAINS ADDRESSED

- Organizational culture and behavior baseline — Westrum assessment across the full organization
- Technical debt and code quality — SonarQube implementation
- Sales-to-engineering alignment — Sales Engineer role creation
- Product organization transition — operating model design
- Strategic alignment and process efficiency — value stream mapping with \$1M+ waste eliminated
- Employee ownership of continuous improvement — transformation continued after the program closed

Why This Worked When Two Previous Transformations Did Not

The two previous transformation efforts at Concord — the Agile program and the DevOps initiative — shared a common design: they delivered frameworks and tools and assumed that culture and capability would follow. They did not.

The ADAPT© program worked from the opposite direction. It started with the organizational culture and behaviors as they actually existed — measured, not assumed. It gave employees real ownership of the diagnosis, the solution design, and the implementation. It built the capability to see waste, to trace problems to their root causes, and to design data-driven solutions from inside the organization.

And it gave the executive team a different role: not sponsors of a program someone else was running, but active participants in a cohort, personally invested in the outcomes, and directly accountable for clearing the impediments that would otherwise have stopped the implementation teams.

The result was an organization that did not just complete a transformation program. It became an organization that knew how to transform itself.

ABOUT THE HELIX GROUP

The Helix Group is an enterprise capability builder — partnering with complex organizations to align leadership, execution, and AI-enabled performance into systems that produce durable, compounding results. Our services include Capability Readiness Reviews, Capability Accelerators, Enterprise Programs, AI Enablement, and the ADAPT© immersive learning program — twelve cohort-based learning paths designed to build the organizational capability that framework adoptions alone cannot produce.

thehelixgroup.net | admin@thehelixgroup.net | 314-944-2228