



interaworks
Case Study

Group of HR Business Partners take on
their second Best Year Yet.

“It’s so much better than it ever was
before; I definitely want to do it again!”



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“Ok, I’ve survived, and that’s got to be good enough for this year,” is how Sara Osterhaus describes the state of mind her team members were in when she decided to bring in a Best Year Yet Group program for her team. Sara leads a group of HR Business Partners for the Americas region of Schneider Electric. As a team, they’d just completed two years full of transformational hard work in the organization including an integration, layoffs, and all the human resources work that goes into supporting such major changes. The whole team had also faced personal challenges – illness, death, divorce, new leaders coming in – and Sara just knew everyone needed an opportunity to catch their breath. The team was coming together for a face to face meeting for the first time in two years, and as part of the meeting she wanted to offer her team a gift: “A learning opportunity as a way to re-set our mindful state, our own goals, our own priorities...An opportunity for self-care, and to focus everybody on what they could be thinking differently and doing differently to set themselves up for success for the following year.” Sara says that Best Year Yet seemed like a beneficial way to give people that personal growth.

What Matters Most



We are being recognized as strong business partners by the business leaders.



My renewed self-confidence is making me more efficient and productive.



It makes me look at the whole me, not just my professional goals.



We work together to ensure the business succeeds.



It makes me proud to be part of this amazing professional team.

“It was a really energizing day, even though it was not at all what we’d expected!” Sara says. Sara describes an emotional, exhilarating day, that helped the team members process previous couple of years, set new ways of thinking, and new goals for the upcoming year. Over the following year after that first Best Year Yet session, Sara and her team held monthly “Virtual Coffee Breaks,” during which they checked in with each other on the goals they set for each month using the goal setting and tracking software in Best Year Yet PRO as a guide. As a program, with PRO as a tool, Sara says that Best Year Yet helped her team to see how big, long-term goals could be possible: “I think that what we all enjoyed about the tool itself is that it is easy, and it is a good place to piece goals out into small, manageable steps.”



Sara says they had excellent participation in the Virtual Coffee Breaks, with everyone setting and scoring their goals. Even if they were just showing up and saying, “Oh my god, I didn’t do anything this month!” the attention and discussions people shared were all “really helpful.” Sara shares stories of seeing major personal transformations that led to professional growth, cheering each other on month by month in their health goals, deciding as a group to do walking meetings rather than always sitting at their computers for their calls, and how as a team, they all shared best practices around how to approach challenges and meet goals. Sara says that their first year taught them a lot, and that the team felt confident that the goals, paradigms, and guidelines they’d set for themselves had been the right ones, and yet, she says they were all thinking, “Man, it’s still hard to do! It still takes time, it still takes work, it still takes attention, but it’s so much better than it was before. I definitely want to do it again, and make adjustments to my process, and take it to the next step.” The team unanimously and enthusiastically decided to pursue a second year of Best Year Yet.

For year two, Sara decided to approach everyone’s Best Year Yet plan a little differently. “Last year,” Sara told her team, “we were all kind of falling apart with life, and I wanted it to be whatever you needed it to be. It was yours, it was a gift to do your own thing. Now, let’s pull it back and let’s see if we can really capitalize on something as a team with some shared roles for part of the plan, and then your own personal things for the rest of the plan.”



To do this, Sara asked their fabulous Best Year Yet facilitator, Jennifer Bried, to offer the team four or five big areas of focus and then provide them options for roles within those areas of focus. “The way we created the team’s key result areas was such a healthy and well-rounded recipe that included corporate values, team values, feedback the business unit received from outside business units, and plenty of room for the individual’s personal self to be represented,” Jennifer recalls. Sara asked her team to choose some work-related areas of focus from a list of options like “Proactive Business Leader” and “HR Superstar,” and then told her team, “Your goals for how you get there are totally up to you, but we’ll all be aiming toward something in a similar way.”

Another difference in year two, is that team members decided to put renewed effort and focus into their personal goals. While Sara saw many positive impacts from the personal side of the goal setting in year one, her team feels like they had much better accountability to their professional goals in the first year because it was right there and easier to prioritize. This year, they want to give due focus to their personal goals, and says her team shares the attitude: “I know I can do it. Now I need to do it on all the things I’ve committed to for myself and have really great progress.” Sara has noted that the monthly Virtual Coffee Breaks have created a space for accountability, support and encouragement conversations, which has been a “fun piece of the program for our team.”

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The monthly Best Year Yet conversations have also helped Sara to more deeply connect with, and support her team members, and it's helped her team members better connect with themselves. Sara shared one story about a team member who, through her new paradigm and reflections on her goal setting, realized that her desire to be a "sought-out expert" was limiting her leadership potential, and her sense of self-worth in her role. After a year of living into that paradigm, Sara says her team member said, "I recognized in myself that I actually AM a sought-out expert, but that's not at all good enough for what I want to be." Sara's team member realized that she'd rather focus on empowering people to do all the tactical things she was doing for them before so that she could focus on conversations and initiatives that move the organization forward; "Her goals this year are around being a proactive, strategic leader, rather than a tactician," Sara reflects. "She's been able to see over the course of the year how much better her new paradigm is for her career growth and for her self-worth in her role. She feels a whole different level of value for the things that she does now versus the things that she used to do."



Sara also tells a story about a team member who made a huge personal life change and how it's had an enormous impact on how she shows up for the team and the organization. During their first Best Year Yet session, this team member set goals around prioritizing family time and her hobbies and passions, and Sara worried she was working too hard to have time for the things important to her in her life. However, toward the end of that year, this team member came to Sara and told her she'd gotten a divorce. Initially, Sara felt worried and concerned for her, but the team member assured Sara that this change had allowed her to make many other changes in her life that she'd wanted, and that she was "very, very happy about it." Sara says she now realizes that when her team member made those original goals, they weren't happening due to other factors in her life. "Her Best Year Yet plan helped her have an awareness and a paradigm shift in her way of thinking that put her on the path where she wants to be...The result of that, for me, is that she's more engaged; she's not distracted by things I wasn't even aware were distracting her, and she's more energized and motivated than ever before to have the role in the organization that she has," Sara says.



After everything the team learned and discovered in their first Best Year Yet, Sara has high expectations for what's possible for her team's second Best Year Yet. Sara says that at the end of the year prior to their first Best Year Yet plan, the team had celebrations like, "We survived and I got more trusted." While she says those accomplishments were good, she knows her team is now ready to make a greater impact. "Everybody worked their tails off," she says, "and we were working really hard 24-7 but not to the right ends. I need us to be thinking differently. I need us to be working smart. I need my team to take all the work they do on a regular basis and stop and take the time to put a wrapper around it that tells a story." This year, Sara knows her team is poised to take it to the next level and accomplish even more. By the end of this year, Sara wants everyone to be able to say, "Here are the ten things I accomplished and I'm so proud of them that I think you can share them with the global team."

"I'm excited about it. Everybody is a little nervous," Sara says. "Everybody is like, 'What are we going to not do to do these other things? What are we going to stop doing? You're changing the game on us a little bit.'" Sara says they just did performance reviews for last year and some went well, while others didn't go quite as well. She says she's now approaching it with the thought process, "You're not just going to get rewarded for working your tail off, we need to hold ourselves in a different way." Sara has assured her team that if they focus on these bigger, more impactful initiatives that some of the other stuff isn't going to matter so much. "People will figure out how to fix the things we weren't supposed to be fixing for them anyways when we focus on supporting them in other more important ways," she tells them.

"You're changing the game."

“So that I can go achieve what I really want to achieve.”

Sara also thinks that people expressing these concerns to her is a good thing. She says that, “In previous years, I didn’t hold them accountable, and they wouldn’t have been able to ask me for help.”

Now they can ask for help, and they do. People are more willing to approach Sara and share with her and with each other where they get stuck and where they need help on their goals. With clearer focus, they know better how to ask for help. This year, Sara has her team members approaching her and each other saying, “This particular thing is what I want you to help me think through so that I can go achieve what I really want to achieve.”

“I wonder if she knows her own brilliance?” questions Best Year Yet facilitator, Jennifer Bried. “Sara is an exceptional leader,” she continues; “She acknowledges that her team needs to move from start to finish, and she came with that end in mind. While she knowingly steps up her expectations, she is also giving them the personal and professional accountability support they need to get there.” Best of all, Sara really believes they can do it. Sara can’t wait to share everything her team has accomplished by the end of year two and we can’t wait to hear about it.

