

CLIENT:

Delap

Delap engaged A.wordsmith to design and implement a multi-pronged internal and external communications strategy to support the firm's pending executive leadership transition.

Client Description

[Delap](#), one of Oregon's largest and most respected accounting firms, provides fully integrated financial services with experts in tax, assurance, business advisory, wealth advisory and cybersecurity.

Project Description

Delap engaged A.wordsmith to design and implement a multi-pronged internal and external communications strategy to support the firm's pending executive leadership transition. After 19 years championing and advancing Delap's people-first culture, the existing CEO decided to appoint a new executive to succeed him and lead the firm into the future. Given the current leader was deeply loved, respected and admired, the firm was concerned about heightened emotions, concern, questions and confusion that would likely arise from employees and clients alike when news of his pending departure was shared. To be successful in communicating this change in a compassionate and thoughtful way, A.wordsmith met with the CEO, chief financial officer, marketing and HR directors and key partners to uncover the pertinent details needed to clearly articulate the announcement, while instilling confidence, optimism and positivity in the future direction of the company.

Key strategies included:

- **Developing succinct, transparent, humanistic and authentic messaging** that reassured employees that Delap's "one team" mindset and mission to "invest in the success of others" remained steadfast. This included developing detailed messaging, FAQs, email language to ensure the executive leadership team were speaking from a consistent, united front.

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Key strategies (continued):

- **Identifying key stakeholders** responsible for delivering the message to internal and external audiences, and ensuring they're equipped with detailed messaging and interactive practice sessions needed to be successful.
- **Pre-emptively controlling the message before news leaked externally to prevent rumors and speculation**, ensuring a delicate balance between transparency and privacy.
- **Shared potential outcomes and scenarios** so employees, partners and clients could visualize and understand how the new could materialize over the long-term. This prevented uncertainty, confusion and skepticism.
- **Fostered an open, honest dialogue** where all employee ideas, questions, emotions, concerns and feedback are valued.

Key Results:

Following the internal communications strategy execution, Delap's senior leadership was able to clearly articulate the business impact and value of the leadership transition to ensure employees understood the overarching benefits to them as well as the firm's clients, and how the change aligned with the company's long-term growth strategy. Perhaps most notably, the firm was able to reassure employees that Delap's people-first culture, strategic vision and commitment to excellence, integrity and compassion in client service was stronger than ever.