

# Case Study: Bassett Mechanical Contractors



Bassett Mechanical is a leading engineering design and advanced manufacturing company that designs, builds and services HVAC and Refrigeration systems for clients across the nation. Bassett is privately held and third generation-led.

## Situation

Bassett was facing concurrent cultural, operational, and leadership challenges as they anticipated a transition to third generation leadership. Additionally, they were newly committed to introducing LEAN principles into existing continuous improvement processes, and were preparing for continued growth through an evolving executive team.

After 30+ years with the same leadership team, the transition to new divisional managers due to retirements and a planned transition for the top role created cultural concerns throughout the organization. Traditional markets served were dwindling, and new market research and development were critical. Future growth and viability required a change in vision and leadership execution.

Bassett Mechanical, based in Northeast Wisconsin, with offices in the Milwaukee and Madison areas, is a mechanical contractor specializing in custom specialty metal fabrication, industrial refrigeration, mechanical systems, HVAC, industrial ventilation, plumbing and piping, service and preventive maintenance.

## Process and Outcome

After several discussion sessions within the executive team, an integrated leadership alignment and development action plan was designed and initiated. Led by Patty Van Ryzin and Kim Bassett-Heitzmann internally and Tom Wiltzius externally, the process centered on three primary objectives:

- Ensure the successful transition of Kim Bassett-Heitzmann to company President and Chief Executive Officer.
- Align the executive leadership team conceptually and operationally around the corporate strategic plan.
- Initiate a leadership development initiative that could be cascaded to middle management in future years.

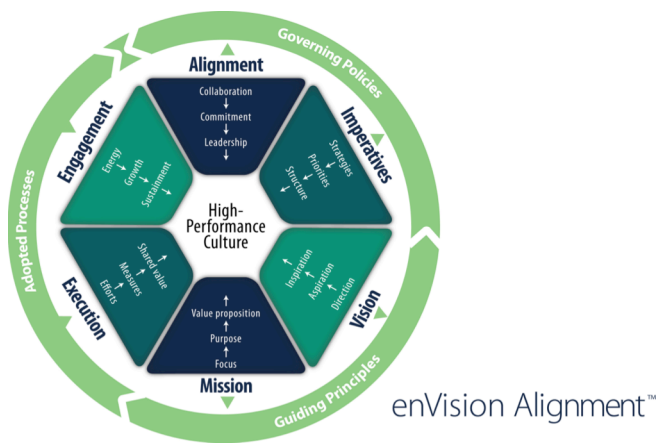
The following initiatives were implemented to accomplish these objectives:

- Evaluated and redefined the Executive Management team to identify the core group critical to move the company forward.
- Coordinated 360 (multi-rater) assessments for the entire Management Team, with clearly defined development outcomes and guided by an outside executive coaching engagement.
- Initiated a current-state organizational assessment to include an internal audit, executive interviews, and team assessment.

Bassett Mechanical has been able to build upon its earned reputation for excellence, enjoying record profitability, enhanced employee safety initiatives, and increased customer satisfaction. During this transition, Bassett Mechanical was awarded the Wisconsin Manufacturer of the Year award, the Wisconsin Family Business of the Year award, and Kim Bassett-Heitzmann was selected as the Athena Winner for the Fox Cities Chamber of Commerce.

- Conducted an Executive Alignment Retreat to engage and align the executive team around a clear and shared view of the organization's current and future state and the steps required to achieve the desired future state.
- Evaluated individual 360 and team assessments, and recommended and executed team training sessions around shared development areas (including Leadership Brand, Coaching and Delegating, Polarity Management, and Mentoring).

Based on this integrated approach, Bassett was able to successfully manage through the various leadership succession transitions and implement LEAN principles throughout the organization for a cultural transition to world-class continuous improvement. Additionally they created and installed a unified vision to carry the company through recent economic challenges, and they remain a strong, competitive player in their markets.



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