

## CASE STUDY

# FORTIS LIFE SCIENCES

**EMPLOYEES:** 350 ▶ **HEADQUARTERS:** Waltham, MA ▶ **FOUNDED:** 2020

## CUSTOMER GOALS

- Unify the company—including 6 recent acquisitions—around common culture and operational processes: the “Fortis Way”
- Address annualized voluntary turnover rate of nearly 30%
- Build managerial skills and business acumen in previously untrained supervisors

## APPROACH

- Began with 2.5-day executive leadership retreat to align internally and understand the Manager360 Leadership System.
- Scaled manager training with 3 offsite retreats for cross-team cohorts at Texas CEO Ranch. Managers learned the Leadership System and developed roadmaps.
- Ongoing follow-up from Manager360 and use of take-back tools ensured the learning was applied.

## RESULTS

Annualized turnover halved from  
28% to 14%

Employee engagement grown, with majority of employees saying leaders were performing better

New cross-team initiatives developed from bottom up, including expertise-sharing Tech Talks

**This was one of the best investments we made this year... The feedback we got from across the organization was ‘Wow.’**

—DEBRA THOMPSON,  
Chief People and Integration Officer



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## BACKGROUND

### The Challenge

- Integrating several recent acquisitions into the mission, culture, and processes of Fortis Life Sciences—the “Fortis Way”
- Addressing an annualized turnover rate of nearly 30%
- Building managerial skills and business acumen in previously untrained supervisors

**Fortis Life Sciences** is a strategic platform that supports the growth and success of founder-led life sciences tools companies. Over 2020 and 2021, Fortis grew quickly: It made several strategic acquisitions of smaller companies across the United States. Each of these teams had its own unique culture, and Fortis faced the challenge of integrating six companies into a cohesive whole, aligned behind a common mission, as they grew from \$0 to \$90 million in revenue in just two years.

Some of the acquisitions, being small and founder-led, lacked formal training for managers. “There were some big gaps in terms of business acumen and management skills—how to set goals, align people behind a common vision and mission, and measure results,” says **Debra Thompson**, then the company’s Chief People and Integration

Officer. Employees were also struggling with the change process of becoming part of a new company. “I wanted to find a way to take these unique acquisitions and anchor them in the ‘Fortis Way,’” says Thompson.

Through 2020 and early 2021, Fortis—like so many others in the labor market at the time—experienced high turnover. Fortis measured its annualized voluntary turnover at close to 30%.

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## CHOOSING MANAGER360

### The Manager360 Difference

- Focus on building a shared management system across the organization
- Ongoing learning and support after training — not a one-and-done retreat
- Credibility of trainers with successful exits and real-world success, not just consultants or HR experts

Debra Thompson, a 30-year veteran of HR leadership roles, had previously attended a one-day preview of **Manager360's Leadership System** outside Austin. She immediately saw the opportunity for a partnership: "I instantly recognized all of the benefits around the common vocabulary, the personal statements written by employees, and aligning everyone in terms of our commitments."

Another draw was the fact that training would be led by Manager360 cofounder **Joel Trammell**, a proven CEO and tech entrepreneur whose leadership has led to several successful exits over his career. For Fortis, the fact that Joel, as well as cofounder and cofacilitator **Alicia Thrasher**, are experienced in real-world business leadership—rather than being merely

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consultants—created credibility and an affinity with the technical/scientific members of the Fortis team.

Debra and her team also appreciate Manager360's ongoing support to companies that implement the leadership system: through weekly follow-up communication, a clear roadmap for every manager, and software for managers. "It wasn't just 'Go for two days and then you're done.' With the follow-up, the certification, the book, and now the software, I knew it was exactly the right type of program for us."

## GOING FOR IT!

### The Engagement

- Organizational Maturity Assessment
- 2.5-day Executive Leadership Team retreat
- Three 2-day manager retreats at Texas CEO Ranch
- Facilitation of MBTI and DISC assessments
- Follow-up coaching and roadmap implementation

Thompson, along with Fortis CEO **Brian Kim**, decided to pilot Manager360 with Fortis's Executive Leadership Team, who attended a 2.5-day Manager360 offsite near Boston in late 2021. "The outcomes were more than expected," says Thomson.

The executives experienced firsthand the value of an offsite facilitated session in which they got to know each other's working styles (and their own) and built a framework for core operating mechanisms like 1-on-1s, team meetings, performance reviews, and more.



*Fortis Life Sciences  
Executive Leadership  
Team at their 2.5-day  
Manager360 retreat*

Over the following months, Manager360 trained Fortis managers in cross-team cohorts of about 15 people each. These retreats were held at Texas CEO Ranch outside Austin, Texas. Thompson emphasizes the value added by the site, which offers peaceful surroundings, panoramic nature views from the training room, and a plethora of activities, including pickleball, golf, electric bikes, and fishing. “That in-person shared experience away from work was highly valuable,” says Thompson. “Many of them had never done anything like that—certainly not since the pandemic.”



## THE RETURN ON INVESTMENT

### Benefits Realized

- Annualized turnover halved from 28% to 14%
- Stronger employee engagement and productivity due to increased managerial skills
- Cross-team collaboration improved, with new initiatives developed, including expertise-sharing Tech Talks
- Identification of managers who were struggling in their roles

Thompson describes the engagement with Manager360 as “one of the best investments we made this year, for a number of reasons.”

Employee engagement was one area that Fortis saw improve after beginning with Manager360. “People really saw a difference in their leaders,” says Thompson. Employees could now count on their managers to hold regular 1-on-1s, set clear goals and expectations, and fulfill other core practices. “The system and tools are absolutely referred

to and talked about openly and proactively,” she notes. In focus groups with employees, a majority stated that their managers were simply doing a better job overall.

Fortis also saw a dramatic reduction in turnover. The company’s overall turnover rate dropped from 28% to 14% after Fortis began working with Manager360. While acknowledging that this outcome was multifactorial, Thompson says, “I know without a shadow of a doubt that the things those leaders learned—about engagement, unlocking employee potential, and doing great 1-on-1s—influenced things for the better. The feedback we got from across the organization was ‘Wow.’”

Another benefit was a shared language and expectations across a widely distributed team. After taking Manager360 processes and nomenclature and adapting it to fit their culture, Fortis managers and employees enjoyed a new sense of belonging and a greater ability to communicate clearly, whether based in Boston, Grand Rapids, Montgomery (Texas), San Diego, or elsewhere.

The new connections made as leaders spent time together at Texas CEO Ranch also provided impetus for Fortis employees to start new initiatives. These include Tech Talks, a program created from the ground up by scientific leaders in the organization. These experts now meet every two weeks to hear a 1-hour presentation about a person or team’s technical capabilities. This has proven

immensely useful in educating the internal team about what they can do together, and in taking offerings across the portfolio and offering them to the life sciences market.

One final benefit was unexpected: Leadership was able to identify managers who, though capable in other areas, did not possess the commitment necessary for serving as a people manager in the organization. A couple of people struggled to apply the system and showed little interest in further developing as leaders, and their teams tended to have greater turnover and more HR complaints. Fortis leadership was able to clearly surface those issues through Manager360 implementation, moving these managers to direct-contributor roles and replacing them with others who were ready to take on the mantle of management and leadership.

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# BENEFITS AT ALL LEVELS OF THE ORGANIZATION

## Executive Team

At the Executive Leadership Team offsite and beyond, Fortis's leaders built a great deal of trust among themselves. "We learned A LOT about each other," says Thompson. She points to the Stephen M.R. Covey quote "Change happens at the speed of trust," noting that the trust gained helped the organization move faster.

"You can't easily take shortcuts on building trust, but one way you can do it is through shared experience, and through transparency and vulnerability. These tools, particularly the MBTI and DISC assessments, really allowed our executive team to meet each other where we are and sing off the same page of music. We got aligned a lot quicker than we would have been able to in the normal course of business."

Leadership also felt more confident that managers throughout the company were effectively fulfilling their roles as leaders.

## HR / People Organization

With Manager360, the people organization at Fortis got a highly professional, proven, out-of-the-box product for upskilling managers without the time, expense, and expertise required to go build their own. Thompson notes that, like most HR teams, hers had a ton on their plates and were expected to deliver results without necessarily having the biggest budget. "I delivered a better product from Manager360 than I could have ever developed as an individual, especially with 350 employees and six companies coming together in less than two years."

**"We were able to give [our managers] very practical tools they can use from Day 1."**

## Managers

Through Manager360, managers at Fortis get the support, attention, and connection that growing leaders need. Thompson describes it as giving them “**managerial courage**”—the empowerment to drive the mission forward, make clear commitments, connect with each other, all while anchored in the shared Fortis Way.

As is common, managers at Fortis are uniformly bright, capable people with strong technical expertise. What Manager360 gave them was a different type of awareness—of how specifically to be good managers and leaders. “We were able to give [our managers] very practical tools they can use from Day 1,” says Thompson.

## Employees

Ultimately, all employees at Fortis benefited from the work done among company leaders.

“Our employees now have a more predictable and consistent experience at the company, and know what to expect from their manager,” says Thompson. “That was something we were really hoping for.” Whether the employee is based in Boston, Grand Rapids, Montgomery [Texas], or elsewhere, the framework and nomenclature is consistent: They talk about meetings and 1-on-1s in the same way, can discuss working styles and personalities in a consistent way, and more. “And quite frankly, they just have better-skilled leaders.”



A cross-team manager cohort from Fortis