



## CASE STUDY

# Building a Sustainable Leadership System for Operational Excellence

How a North American Investor-Owned Utility Embedded The Elevation Engine™ in Five Months

**\$20M+**

Verified Savings

**70%+**

Lean Maturity Gain

**350+**

Leaders & Employees Engaged

**9 Months**

To Measurable Shift

## THE CHALLENGE

A large IOU's lean transformation had enterprise sponsorship but stalled during implementation. Leaders viewed lean as compliance, not leadership discipline. Teams operated in silos with limited performance visibility.

**Core barriers:** No structured accountability for OE outcomes. Resistance to external coaching. Gaps in leader capability around continuous improvement, problem-solving and standard work. Previous initiatives dismissed as 'flavor of the month.'

## THE APPROACH

The Operational Excellence System (OES)—a tailored application of **The Elevation Engine™**—provided the structural backbone. Three connected drives guided execution:

**Structural Lift:** Process and cost stability through waste elimination

**Cultural Thrust:** Leadership capability, coaching cadence, and engagement

**Strategic Altitude:** Long-term alignment, command centers, and sustainability

A four-phase roadmap—Launch, Adopt, Standardize, Sustain—guided execution. Each phase built on the last, allowing leaders to practice and reinforce new habits before scaling.

## KEY ACTIONS

**Command Centers:** Five cross-functional hubs established as problem-solving and escalation centers, connecting strategy to daily execution.

**Leadership Coaching Cadence:** Weekly routines capturing reflections, wins, blockers, and next steps. Coaching cycles connected leadership behaviors to business impact.

**Champion Activation:** Internal champions led workshops, modeled lean behaviors, and created cultural traction beyond formal training.

**Governance & Scorecards:** Visual scorecards reinforced alignment, made progress transparent, and created peer accountability.

## WHAT MADE THIS DIFFERENT

OES embedded operational excellence into the leadership system itself. Leaders didn't attend workshops—they practiced lean behaviors in daily work. Command centers didn't meet to review status—they solved problems in real time.

*'When structure meets commitment, operational excellence becomes not an initiative - but the way work gets done.'*

## About Optima Advisory Partners

We build accountable operating systems for regulated infrastructure—connecting leadership behaviors, operational execution, and measurable outcomes. \$480M+ in documented savings. 92.9% program success rate across 11+ years.

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