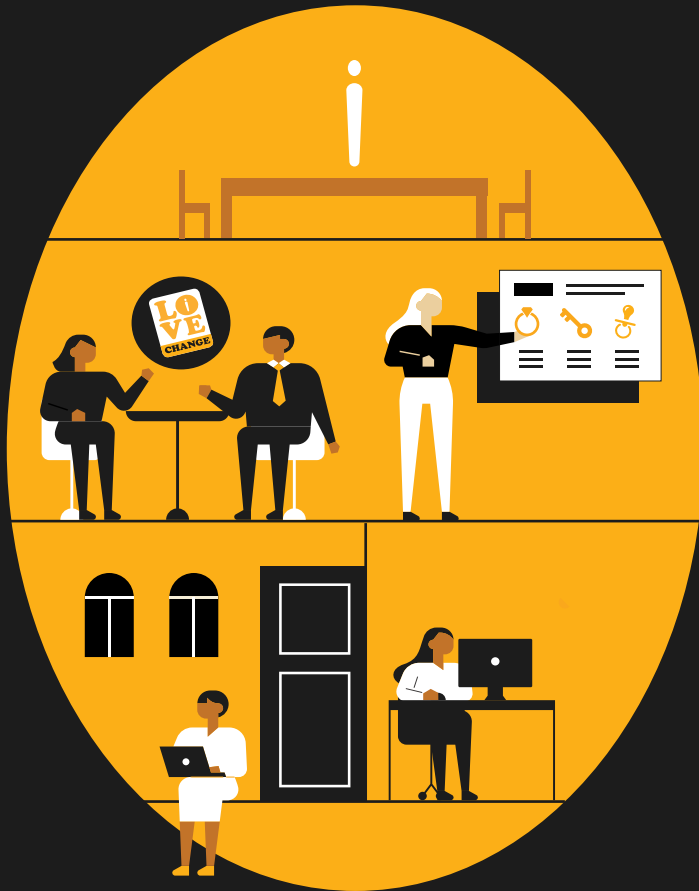




How a business used **storytelling** to entrench its unique culture as it **navigated change**

Growing the dining-room table: From start-up mode with a culture of founder stories to sharing employees' stories on personal purpose.

March 2025

BRiGHTROCK

Executive summary

BrightRock's evolution from a **fintech start-up** to a leading financial services provider required embedding its **entrepreneurial culture** while adapting to corporate scale. The **needs-matched way** initiative was developed to **codify and sustain its unique identity**, ensuring alignment between its **market value proposition and employee experience**.

The Challenge and Opportunity

As BrightRock expanded, it faced a critical challenge: **retaining its agile start-up culture** while integrating the governance and operational structure of a corporate player. This required balancing **innovation with scaling and standardisation**, ensuring employees remained deeply engaged in the company's mission and way of working.

The Solution: A Culture Built on Storytelling and Purpose

BrightRock leveraged **storytelling and personal purpose** as strategic tools to shape its culture. Partnering with **GIBS, Pepperdine Business School, and Abundance at Work**, the organisation developed a **learning and leadership framework** focused on engagement, narrative, and alignment to company purpose.

Key initiatives included:

- **The Needs-Matched Way** – Seven core principles guiding BrightRock's work culture.
- **Structured Learning Journeys** – Workbooks, digital tools, and interactive activations.

- **Hybrid Training Models** – A mix of in-person and virtual learning to support hybrid teams, with iterative feedback cycle.
- **Employee Storytelling and Digital Tools** – A mobisite for employees to journal and share personal purpose narratives.

The Impact

- **Market Growth** – Increased penetration in the independent financial adviser market, with policyholder retention exceeding industry benchmarks.
- **Operational Efficiencies** – 55% reduction in service escalations, 20% improvement in turnaround times for activities in our control.
- **Employee Engagement** – Higher participation in cultural initiatives, leading to greater leadership alignment and, ultimately, improved client outcomes.
- **Investor Confidence** – BrightRock's majority shareholder increased its stake to 100% ownership, citing BrightRock's unique market offer and positioning.

Conclusion

BrightRock successfully transitioned from a disruptive start-up to a **mature, purpose-driven organisation**, demonstrating that culture is a strategic asset. By embedding storytelling and leadership agility, the company has ensured its people—just like its products—are **designed to adapt to change**.