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Client Case Study

Unilever

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**How Mental Fitness  
increased employee  
motivation by 15%  
during a period  
of transformation**

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Symbia



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# What is Mental Fitness?



**Mental Fitness** is at the core of everything we do. It encompasses psychological agility, emotional regulation, mindset, and resilience and leverages emotional and social intelligence to better prepare us to play the long game – both in business and life.

In a complex and uncertain world, we all need tools to understand and manage our most important asset - **our own minds**. Our minds are our brakes and our accelerators and as we face the new world we need to consider how we respond to change because rarely is change actually the problem, the problem is our natural human resistance to it.

We use the term '**Mental Fitness**' deliberately because the concept focuses on **prevention rather than cure**.

Just like we go to the gym to exercise, to strengthen our bodies to get physically fit, we want people to be putting the same effort into their mental fitness to learn how to **navigate thinking and emotions** better, how to **approach challenges with patience and empathy**, **overcome stress and anxiety**, and apply practical strategies to help **cultivate a more positive, growth mindset**. This prepares us to play the long game in business and life.



## The internal impact of business transformation

Change most often creates uncertainty, which breeds doubt, insecurity and fear. So when organisations change it creates the same type of uncertainty for employees.

But ‘restructures’, reorgs or transformations are inevitable as companies strive to remain relevant, agile and profitable.

As the world continues to change at an unprecedented rate so do we and so do our companies, as such we need our people to be open to change and side-step the natural human tendency to resist it.

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An alarming statistic from research conducted by McKinsey shows that there’s a **70% rate of failure in business transformations.**

That’s enough to make any company pay attention.

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## Why do 70% of business transformations fail?

That’s the million dollar question, for sure there are a variety of complex reasons. But one factor that is frequently undervalued and dismissed is Mindset, but we also know that **Mindset is the most important driver of exceptional strategic execution.**

- In organisations identified as extremely successful, 72% of respondents noted that the transformation ‘entirely’ or ‘very much’ took mindset into account.
- In those organisations identified as not at all successful, this number drops to 8%.

We know from numerous studies, emotional intelligence leads to a better ability to manage our emotions and thoughts, and this ability leads to better mental health outcomes (less stress, anxiety, negative thinking) which both directly and indirectly lead to better performance over time.

**Because we know this, companies need to be able to leverage this insight to their advantage—which is exactly what the CMI function within Unilever did.**

# Navigating transformation in a global organisation



**Unilever** is a global FMCG company that owns more than 400 brands and employs more than 155,000 people in 190 countries.

In the past 10 years, Unilever has initiated multiple major organisational restructures, in order to remain relevant, operationally strong and agile in the new world. One global UL function in particular, CMI (Consumer & Market Insights) has redesigned itself in a number of ways in order to maximise expertise while continuing to support brand teams with market and consumer insight. As with all major redesigns there have been both benefits and consequences. That's why it is essential to have ongoing programs in place, after the initial change, to manage the expected and unexpected consequences of such redesigns.

In this case study, we'll share with you how we supported Unilever's global CMI function to:

- Successfully work through the organisational restructure while **avoiding the usual drop in customer satisfaction** where a 24% drop in customer satisfaction and a 22% reduction in customer loyalty is typical
- Shorten the time it normally takes for junior staff to gain the corporate experience required **to find their voice and footing in an intense, rapidly changing environment to confidently collaborate with senior leaders and implement change** in a complex organisation
- Create an environment where **77% of participants claimed an increase in performance and increase overall motivation by 15%**
- Positively impact the **resilience and mental fitness of 86% of participating team members**, an issue that is now top of mind with many corporations struggling with the current crisis caused by the global pandemic and ongoing changes business will endure to stay relevant

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# The Challenges

**Challenge #1**

Minimising disruption, reduce tension and pressure in the workplace

**Challenge #2**

Rapidly creating an integrated, high-functioning workforce

**Challenge #3**

70% of transformations fail

**Challenge #4**

Accelerating the organisational learning curve

**Challenge #5**

Creating & rolling out a cost-effective yet impactful global development plan

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## Challenge #1



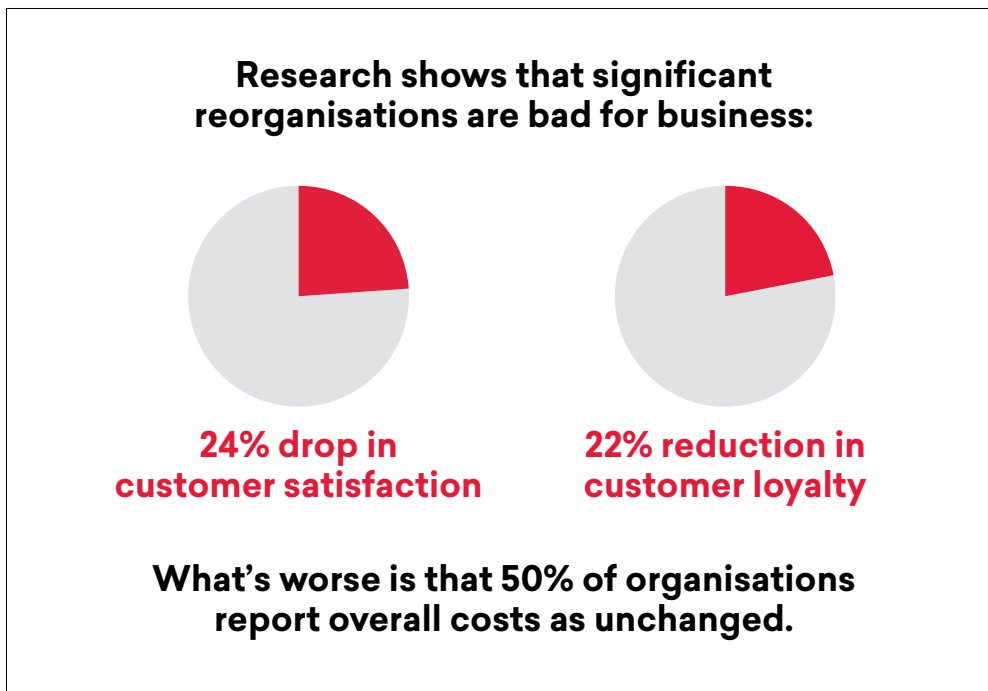
# Minimising disruption & reducing tension and pressure in the workplace

No company is immune to change in a global marketplace that's hyper-focused on improving KPIs. The life expectancy of a Fortune-500 firm in the 1960s was around 61 years. Today, it's less than 18 years. Uncertainty, speed of change, changing consumer and customer expectations, and digital disruption — all of them pose new questions and require organisations, leaders, and teams to adapt and evolve in order to stay relevant.

Companies facing budget restrictions, or those looking to implement new business strategies, find that these initiatives often require new leadership, re-locations, tighter budgets, and workload increases for junior staff to ensure that company goals are being met.

Unilever, as a whole, was in the middle of a restructuring process that involved changing roles, the formation of new teams, people leaving the company, and the hiring of new talent. While this process isn't new to the company, integrating team members after these changes had occurred brought complexity.

Knowing that CMI is a critical and highly valued function within the business, the CMI Leadership Team needed a solution that would minimise disruption, reduce tension and pressure with internal business partners, and improve motivation and communication within their teams. And they needed a solution before job satisfaction and employee morale was negatively impacted.





## Rapidly creating an integrated, high-functioning workforce

In addition to the restructure, other factors had stirred up tension as employees strived to change their old ways of working for the new. Business partners also had to readjust their expectations and the assumed deliverables of each team within the function.

To meet these increased business demands, improve team collaboration, productivity and overall elevate the function, CMI focused on integrating 300 people over a two-year period. No small under-taking but a demonstration of their commitment to positive change.

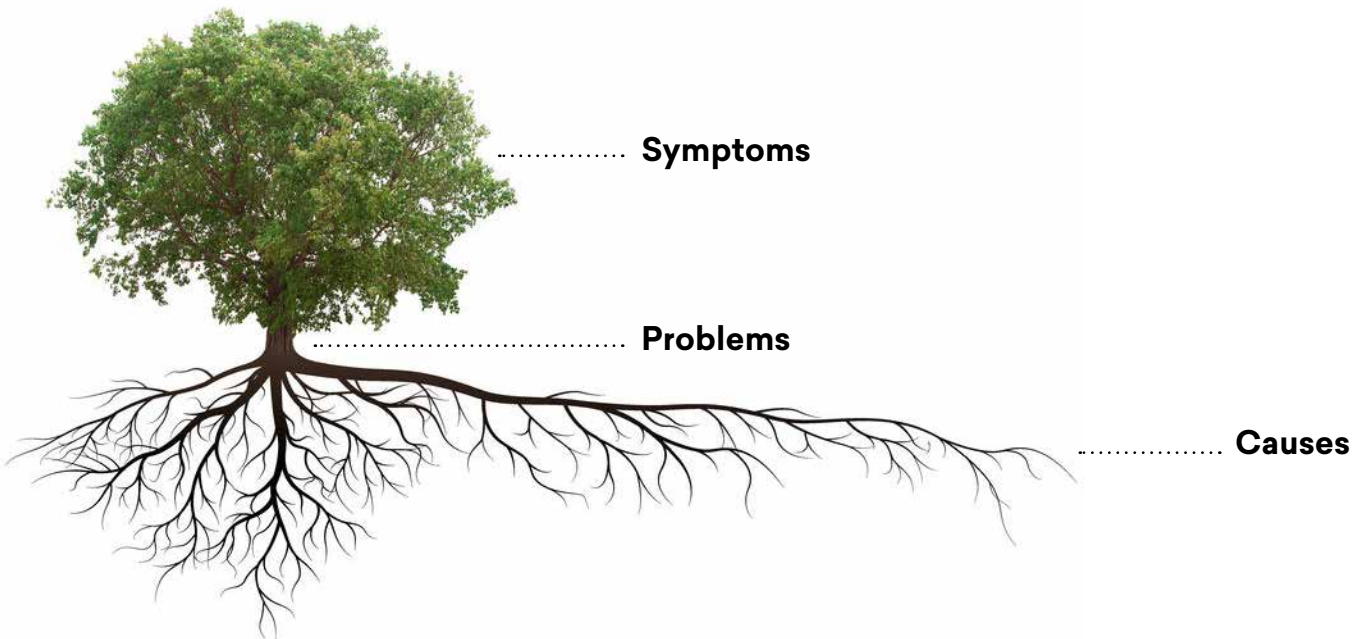
### Some issues that teams were facing included:

- 1 Tension at every level**  
Company and function-wide communication from senior leadership not landing in the intended way, or landing too late, bred some feelings of frustration, isolation, and general unrest. Communication and misaligned expectations (or unmet expectations) are common issues in most restructures, but important to address none-the-less
- 2 Increased pressure to deliver**  
A demand to increase performance and deliverables whilst not increasing costs – an ambitious target – and one which stretched already thin resources.
- 3 Low bandwidth**  
The need to quickly onboard new employees in companies can sometimes increase the organisational learning curve, resulting in employees feeling lost or unsure of their place and hesitant to speak up and engage until they feel they know or understand more.
- 4 Lack of organisational clarity**  
Role shuffling and lack of clarity of roles and responsibilities left existing employees feeling confused and concerned. This led to some territorial behaviours, and a general low-level frustration around a perceived imbalance of labour



# 70% of transformations fail

## Treating the symptoms, rather than the root causes



### What happens during a time of rapid change?

As we stated before, McKinsey found that **70% of business transformations fail**. Why is that? When faced with disruptions, market opportunities or budget restrictions, companies are typically pressured to quickly upskill their existing base on immediate needs or rapidly source and onboard specialised staff as a quick fix to fill gaps. L&D teams or line managers are then relied on to accelerate and follow through on the training process.

### Why is it easy to miss the 'real' problems?

In workplaces ripe with disruption, an increased pressure to perform, and organisation-wide change, it's not unusual for various issues to surface at the same time. These can include ineffective communication, dissatisfaction, lack of engagement, and the unwillingness to speak up and be accountable for results.

However, it's hard to 'read the label from inside the bottle' meaning, busy workplace dynamics make it challenging for companies to identify the root cause of the issues at hand.

As one executive put it:

***"A business need is identified, and we then tend to jump into "let's get a solution to satisfy this need". What we don't do well is actually delve into that a bit, and actually do a more robust needs assessment. We do create a brief, but it's often without the back end context."***

### What's the impact?

A logical shortcut to quickly fulfilling an assumed 'need' is to reach out to providers other teams have used to address similar issues before.

Unfortunately, without properly taking the time to consider and assess the problems, organisations can end up treating symptoms (e.g. "my team doesn't know how to collaborate" or "my team need to learn how to be more innovative") instead of the actual root causes of the symptoms.

## 70% of transformations fail continued



Another key problem with the approach that many transformation programmes usually have is that they focus on the ‘what’ — functional skills and knowledge gaps — and often overlook ‘how’ people show up. Mindset can positively or negatively impact learning and the change process, but it rarely gets factored in. After all, mindset can be something largely ambiguous and intangible, while skills are tangible and the ROI is easier to see.

### Why is a strong mindset important for change readiness and professional growth?

Mindset is the difference between an individual believing they can do something — which gives them the courage and drive to get into action — and someone thinking they can’t or that change is out of reach — which can leave them spinning in a state of inaction, frustration, or complacency.

It is the ‘how’ in how people grow and develop that we believe makes the difference.



**Mindset**, rather than lack of skills, is often the missing foundational piece that stands in the way of growth and productivity.

This is why it’s so important to ensure individuals are ‘mentally fit’ to handle the uncertainty of big changes, are emotional and socially intelligent to navigate the various phases of change and are mentally equipped to handle the inevitable setbacks along the way.



# Accelerating the organisational learning curve



Particularly in junior work levels or those new to a company, a lack of confidence and organisational knowledge, typically developed and practiced over the course of a career, can affect the productivity and overall impact of a team or function.

Unilever experienced this first hand.

In this case, the company had the global reach to attract new and fresh talent and specialists from various industries including start-ups, but many found there was little time to settle in. They also struggled to navigate Unilever's corporate structure and politics leaving them feeling unsure of themselves.

This led to many not 'speaking up' when required to give inputs or not engaging with business partners or senior leaders from a position of authority, as they lacked the overall confidence which usually comes with time.

As one Director put it:

***"They need to make themselves wanted at the table, not just add to the number of people in a meeting."***



# Creating and rolling out a cost-effective, yet impactful global development plan



## The issue of time, location, and logistics

In today's competitive marketplace, large corporations are forced to maximise time as much as possible. And in CMI's case, there was a need to rapidly provide a programme for 300 people across 26 countries and multiple time zones, potentially rolling it out to other functions across the globe.

Global training initiatives can often face logistical and cost challenges in scaling programmes where vendors need to be physically present to deliver content or deliver through a 'train the trainer' approach where internal HR has to be trained on content and facilitation skills. From a global perspective, neither of these options are ideal, as they could add time, cost and resource to the initiative.

Because of this, many corporations have embraced online learning programmes as they offer flexibility in scheduling, are often more cost-effective to implement, allow companies to track performance and engagement, and makes it easier for them to identify and learn from employee outcomes.

## Translating face-to-face experiences

While there are many benefits to virtual, where some suppliers fall short is in simply translating existing face-to-face programmes to online. This opens up a different set of hurdles to overcome.

In a virtual world, special attention needs to be paid to the following in order to create change that is truly impactful:

- Building trust and rapport between participants and the facilitators, particularly important for longer programmes
- Having the right balance and mix of content delivery (live, self-serve, etc)
- Solidifying learning for practical applications
- Ensuring employees are engaged and feel supported
- Fostering a sense of community and shared learning

In addition, since there is a considerable up-front effort and investment for the provider in creating engaging virtual experiences, most programmes or content tend to be standardised and 'off the shelf', which doesn't always satisfy client needs.

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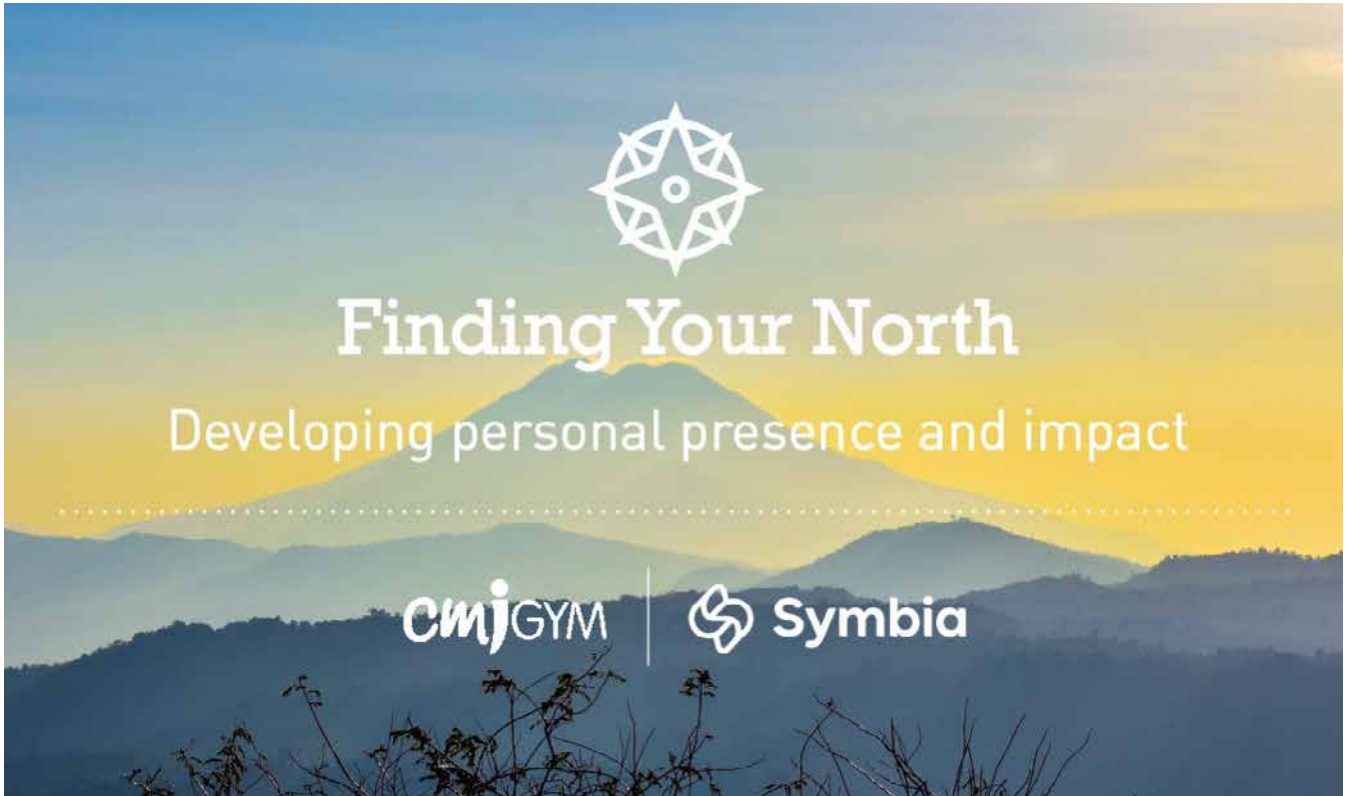
# The Solution

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# Finding Your North: A bespoke solution for development & growth



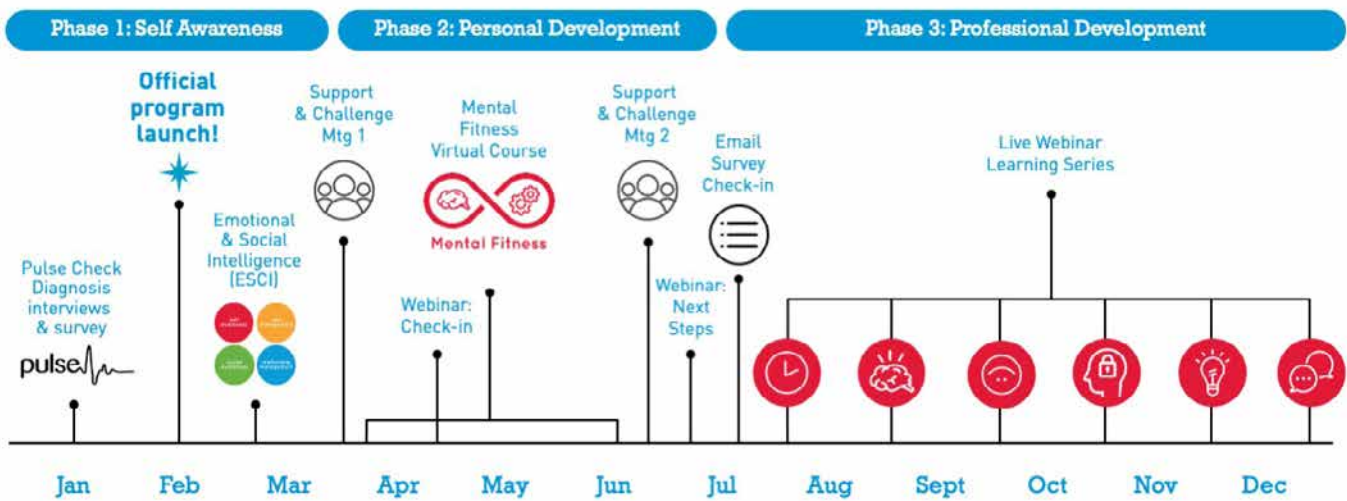
After working closely with Unilever’s CMI team to ensure the right topics and content were developed in the right way, the result was Finding Your North: a 12-month bespoke programme designed to help individuals accelerate the development of their personal presence and impact.

Our approach centred around using emotional and social intelligence-based content to help some 300 of CMI’s people spread around the world increase their mental fitness by really understanding their own thoughts, emotions, and behaviours, and the impact that these have on the people around them and the business. The insights and self awareness uncovered are what helped participants to embrace change and effectively manage their emotions, ambitions, and behaviour in the face of setbacks and uncertainty.

*“This programme teaching social and emotional intelligence couldn’t have come at a better time. It has really given people security in their roles, and to make them more valuable in the workplace.”*

**Sam Paterson**  
CMI Gym Project Lead

# Finding Your North: A bespoke solution for development & growth



Being able to scale learning globally while providing guidance and teaching relevant for each participant made it important to run Finding Your North 100% virtually. This ensured every participant around the world had the same experience, while keeping the individual's needs central to the content.

The programme was split into 3 phases, each one designed to build upon the insights and learnings of the previous phase. Content was delivered via a blended approach of a 360 emotional & social intelligence assessment, live webinar sessions, self-led virtual learning, group & 1-1 coaching sessions and peer mentoring to cover different learning needs.

## Phase 1: Foundations of Self Awareness

Assessing key challenges and training needs through interviews & surveys and laying the foundation for change through individual emotional & social intelligence assessment.

## Phase 2: Personal Development (Mental Fitness)

Centred around our 5-module online Mental Fitness training course, participants had full access to videos, demos, and PDF downloads to work on developing their cognitive control and self-regulation skills. Further support was provided via live Q&A sessions with Jodie and multiple check-in webinars scheduled throughout the course.

## Phase 3: Professional Development (Influence and impact at work)

A series of live interactive learning webinar sessions covering a variety of topics designed to cultivate social awareness and relationship management skills and allowed participants to see and apply theory into practical real life scenarios.

# Phase 1: Foundations of Self-awareness



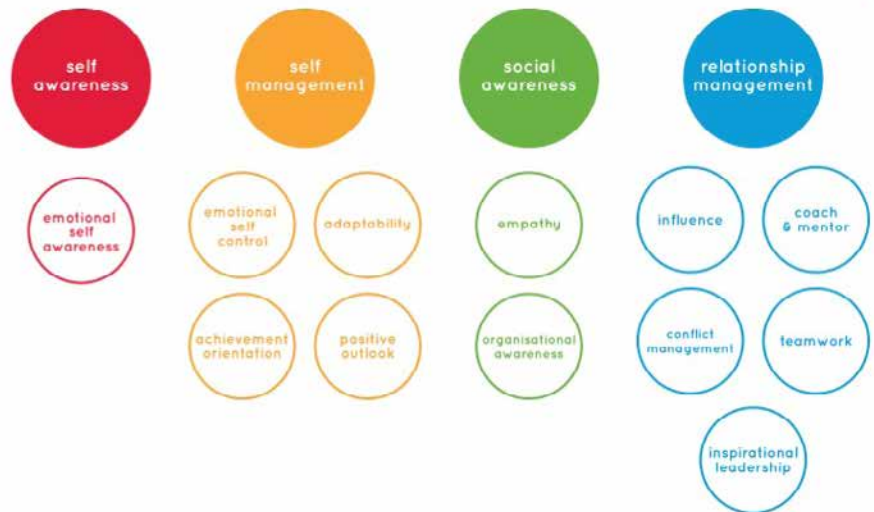
## Pulse Check diagnosis

To gain an understanding of the concepts participants wanted to explore and to ensure the programme was addressing their real issues, we started with our Pulse Check diagnosis which included qualitative stakeholder interviews conducted by our team of market research experts along with a function-wide quantitative survey and analysis. This survey also allowed for benchmarking metrics to track the success of the initiative over time (outcomes shared on pg 20).

## Assessing emotional & social intelligence

As a foundational component to change and development, each participant was able to measure their current level of emotional & social intelligence using a robust assessment model called ESCI (Daniel Goleman's Emotional and Social Competence Inventory), which has been validated over 30 years of research, in field usage and peer-review. The assessment covers 12 key competencies, known to distinguish 'exceptional leaders' from 'average' ones.

Once completed, the insights surfaced from the ESCI assessments formed the basis of each individual's 3 target improvement areas.



# Phase 2: Personal Development



Building off the insights participants gained about themselves in Phase 1, Phase 2 was comprised of our 5-module online Mental Fitness course to further nurture the development of self-awareness, develop cognitive control and self-management skills.

Through a series of self-guided video content, downloads, demos and exercises delivered in an accessible fun and engaging way, participants were empowered with the knowledge and tools to consciously navigate their thinking, regulate their emotions, manage stress and skillfully handle uncertainty. first learned about and then practiced each of these skills.

The team worked through a variety of learning experiences, including:

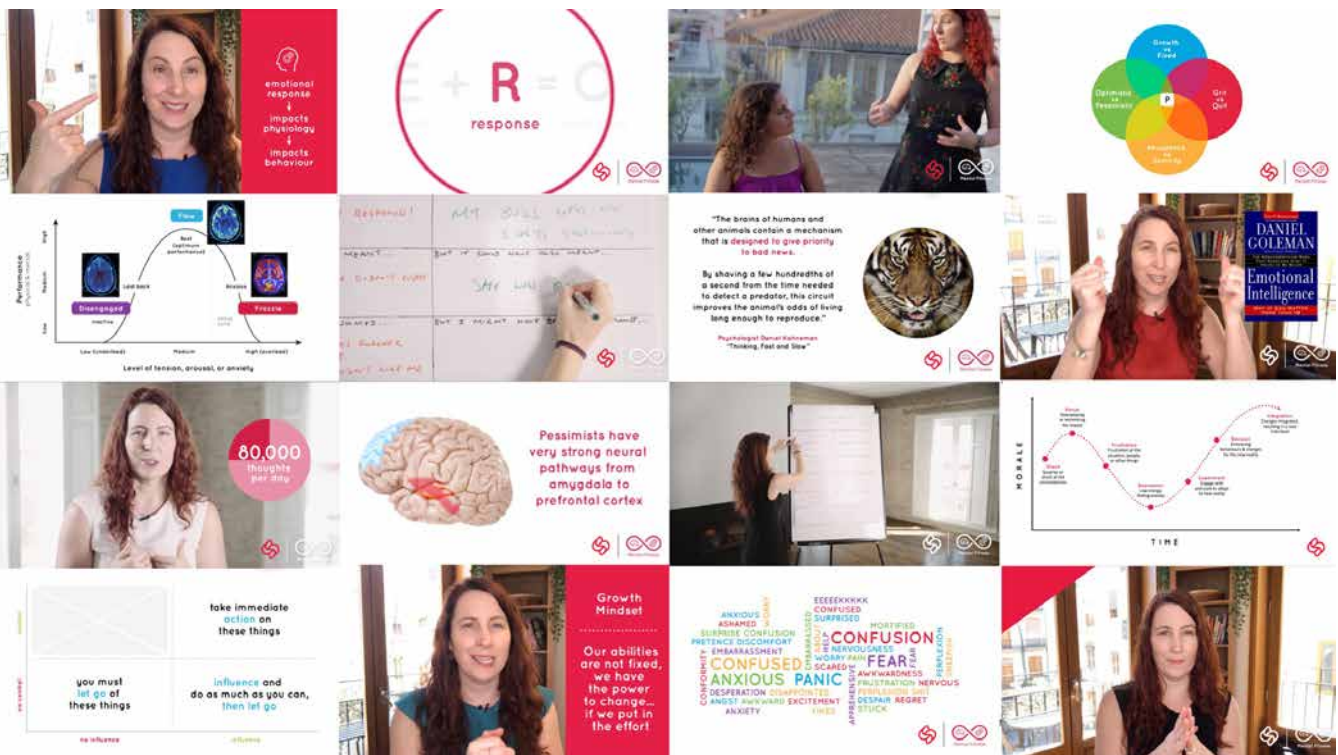
- An introduction to basic neuroscience concepts to better understand the workings of their mind
- A blend of psychology and behavioural economics to understand their reactions to situations and events

- The role of perception and how it influences thinking, emotions and behaviour (for the good and the bad)
- How to identify and reframe limiting beliefs
- Tools and techniques to create an immediate positive change in mindset and thinking
- Understanding stress and performance and how to optimise their relationship with both

Throughout the course, participants were further supported through live Q&A sessions, check-in webinars with the full team, and guided Support & Challenge group sessions. They were able to learn valuable skills and strategies that catered to their own strengths and weaknesses, to show up in a more confident, impactful way in the work-place.

***“Rather than getting easily offended or taking things personally, I’m thinking more about the reasons I am reacting a certain way and thinking more about where people are coming from.”***

— Unilever Employee



# Phase 3: Professional Development



When theory isn't put into practice, valuable lessons can fail to translate into the workplace or towards long-term behaviour change.

The third phase of Finding Your North focused on putting theory into practical real-life scenarios through a series of live interactive learning sessions covering a variety of topics designed to cultivate social awareness, influence, and relationship management skills.

Content and teachings were created based on topics firstly shortlisted by line managers and business partners and then specifically chosen by the participants.

This phase was essential for teaching participants how to put together and consolidate the learning from Phase 1 & 2, then practice these newly learned skills, to become more confident, higher performing members of the Unilever CMI community.

*"I can feel the baggage I've been carrying around since childhood being shrugged off. I feel lighter in spirit, able to choose my response to situations, and more confident and happier in my role. I'm a better business partner because of it."*

**Karen Sears**

Director, Global Consumer Insights

## Selected topics from FYN years 1 & 2



**Motivation & Productivity**



**Confidence Under Pressure**



**Effectively Managing Conflict**



**Inspirational Leadership**



**Standing Your Ground**



**Making Compelling Recommendations**



**Storytelling for Business**



**Problem Reframing**

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# The Outcome

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# Big impact, small investment



**77%**

agree that program has helped them improve their performance in their job

**79%**

of respondents claim to have more confidence as a result of the programme

**80%**

of respondents believe 'the investment the business has made has been valuable both to me and the business'

**88%**

of respondents feel very or extremely motivated in their role\*

\*A **15% increase** from the programme start

**86%**

of respondents felt well or very well-equipped to handle pressure and stress\*

\*A **26% increase** from the programme start

## Overall positive impact

Following the close of the Year 1 pilot programme, the Unilever CMI team saw such a positive impact that they immediately renewed the programme for a second year with an additional 150 participants.

Unilever's CMI participants overwhelmingly bought into the programme with **85% of respondents saying that the Mental Fitness course concepts were valuable and easy to use.**

Other direct employee testimonials highlighted the programme's effectiveness at helping them identify and overcome workplace obstacles, and develop new methods to become more productive and confident.

## A combination of factors contributing to a successful experience

The ease of access to content (in addition to the self-guided online course, webinars and sessions were available both live and recorded) required an average of 1 hour of employees' time each week. There was no daily training or hours of meetings required, which minimised any negative effect on productivity.

The programme's engagement tactics like peer support groups, engagement boards, a point system, etc were used to build momentum, encourage participants, and impart a sense of accomplishment and growth. This coupled with the personalised, empathetic attention of our facilitation team transformed learning from that of a one-way training to a united community experience.

# Choosing the right partners



A large part of Finding Your North's success can be attributed to our process in developing the right programme for the function. In their minds, 4 key areas stood out as game changers:

- Pulse Check, our upfront diagnosis stage
- A considered programme engagement plan
- Our reputation for high quality delivery and materials, making the client a 'hero' for their team
- Content delivered in a phased, journey approach to learning

## Strong commitment to create a truly bespoke solution, fit for CMI's distributed global teams

The start of any of our projects or engagements begins with Pulse Check, a deep dive diagnosis stage to assess the full spectrum of the situation. We do this to identify the actual underlying root causes of surface issues instead of simply selling in a one-size-fits-all solution.

*"They really wanted to understand what I was looking for... I could tell that they were looking to help this work rather than sell a product..."*

*"This was reinforced by their specific experience and deep understanding of how we are structured and how things work in our organisation."*

The initial one-on-one interviews with key managers and business partners played an important role in ensuring that the proposed programme was customised to the unique needs of the function.

The Pulse Check stage not only ensured employees got exactly what they needed, but it also made them feel that senior leadership was listening and served as a demonstration of their support for the team.

## Unique approach to maximise participation and employee engagement rates

Knowing the importance of this programme in the development of the CMI function, we made sure to address engagement through a few key ways:

- **Naming & branding** - To give the programme gravitas and a sense of exclusivity, we created a programme name, accompanying logo, and branding for all marketing and programme materials.
- **Online programme group site** - A private space for participants to engage with facilitators, share content and connect with each other.
- **Consistent communication** - To keep momentum and interest going over the course of the programme, we developed a full-year's worth of bespoke engagement communication including reminders, logistics, encouragement, and more.
- **Guided peer support groups** - Called 'Support & Challenge groups,' these connected global participants together in small, intimate groups to help them guide each other through insights, content, and learnings throughout the programme. For each meeting, we provided them with discussion guides to help ensure their conversations were deep and impactful to the experience.
- **Celebrating individuals** - We created a point system to highlight and acknowledge the efforts of active participants. The point system helped to promote accountability and generate overall interest.

# Choosing the right partners



## Our high standard for delivery and materials, make the client a hero

We take pride in having high standards when it comes to project details, branding, logistics, and delivery. Our ambition is to make the learning experience an enjoyable one and the client's life easier. Those who have had a chance to work with us before, know that:

1. The participants, including senior staff, will get a unique, impactful experience

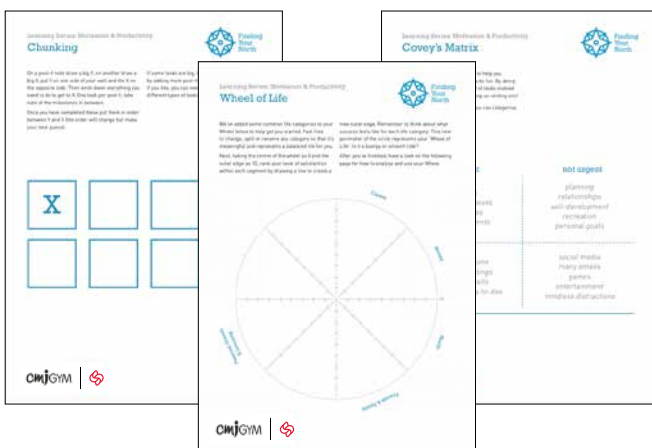
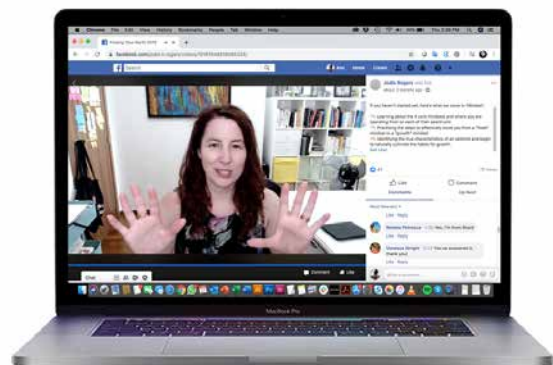
***“Very professional, but also very exciting and dynamic. Slick, but warm. You’re in a safe set of hands, you’ve got a good trusted advisor and partner.”***

***“The thing with Jodie and her team is that they basically exceed our expectations every time we work with them, which is why we come back to again and again.”***

2. We go above and beyond, making the internal Unilever team’s job easy while also making them look good to their colleagues and management

Project leaders and sponsors value the fact that nearly all the communication and project components are prepared or handled for them with all materials consistently ‘right the first time’ in regards to content and design. From the proposal through to primary and supporting materials — there is no need for rounds of edits.

***“Specifically what I love about Jodie and her team is that you know that if they do something with design, the way it looks and feels will be really good... and you’d be surprised how many people in the business don’t do that.”***



# Choosing the right partners



“**The Finding Your North programme was developed to help our less experienced team members advance.** They need to make themselves wanted at the table, not just add to the number of people in a meeting.”

.....

“**In Phase 2, we started the Mental Fitness course and this is where things got really interesting.** It consisted of online modules mixed with a perfect blend of videos, downloads, examples, tutorials and exercises. It was uncomfortably confronting at times which is the space where self-awareness is best nurtured.”

.....

“Having completed the Mental Fitness course, the biggest change I have noticed in my team is their confidence in themselves. It not only made us more aware of the factors that can hold us back as individuals and the reasons behind that but **it gave us the tools to deal with these factors which ultimately results in a more positive and confident team.**

This course also enabled the team to be far more open in sharing work and asking for support and or feedback which in turn results in a stronger impact in the business.”

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“**This was such a good journey for me –** a reminder on our cognitive filters (i.e. the way we see the world) and how this can truly impact our work and our interactions. That we need to consciously decide how to deal with difficult/tricky situations that we do not have control over. The second learning for me was on **my self-imposed limitations and how to consciously challenge myself to not only overcome but to exceed my own expectations.**”

.....

“In every module there was something for everyone and feedback was always positive. **‘Mental Fitness’ has helped participants to truly discover what makes them tick, what drives them, what doesn’t and what they can do about it.** But it didn’t stop there, participants were provided strategies on how to best **develop their own strengths, to challenge their weaknesses and to be a substantial player in the world of self-management.**”

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“Thank you to Jodie and everyone behind FYN. The Mental Fitness course has been personally enriching. **The exercises and the reflections are not just about gaining self confidence but more importantly it gave me back ME.**”

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Client Spotlight

Unilever

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**How can Mental Fitness  
help your team?**

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# How can Mental Fitness help your team?



The current global crisis has had a very personal impact on our teams individually — finances, family, future plans, and goals — all enormous things to be coping with while trying to work towards contributing to the survival of companies and businesses.

As our businesses pivot to survive, scenario plan, and innovate, our employees come under even more pressure. This is the reality that we and our teams will be dealing with for the foreseeable future. And while leaders may not have much control over deadlines and targets, what we DO have control over is how we can help our teams take on these gargantuan challenges.

Companies need to ensure that their employees and teams are best equipped with the mental skills to face the challenges that uncertainty brings and the right mindset to thrive in the way the world is changing — that's where Mental Fitness comes in.

Our programmes and content are all rooted in Mental Fitness and designed to empower your team to skillfully navigate their thinking and emotions to approach challenges and setbacks with agility, patience, and a positive mindset. This in turn has been proven to give people security in their roles, and make them more valuable in the workplace in leading companies around the world.

**If you're interested in exploring how we can help you get similar results as Unilever and our other clients, contact us at [team@symbiapartners.com](mailto:team@symbiapartners.com).**

## Clients who have already embraced Mental Fitness:



# About Jodie



**Jodie Rogers**  
Founder &  
Managing Director

For nearly 20 years it's been Jodie's business to understand what makes people tick, and to use that learning to help them be more engaged in their work, feel more empowered and so become more productive for the business they're in.

As a human behaviour consultant, skills trainer, and facilitator with a background in psychology and interpersonal communications, Jodie founded her company with a specific focus of helping to build dynamic teams of emotionally and socially intelligent individuals who are pro-active problem solvers, resilient in the face of change.

Together with her team, she works closely with global corporates like Unilever, Barclays, and L'Oréal at individual, team and leadership levels to help guide them on understanding the psychology of decision making and the importance of 'Mental Fitness' as a catalyst for growth.

# Our core team



Our team encompasses an array of competencies beyond professional development such as qualitative and quantitative market research, human resources, marketing, branding, design, and corporate education for industries including healthcare, tech, telecom, financial services, consumer goods, and non-profit organisations.

We draw from this vast experience to deliver 'beyond the brief' for our clients and their teams.



**V. Ann Suvarnapunya**  
Content & Creative  
Director



**María Piquer**  
Project Co-ordinator



**Hannah Benton**  
Qualitative Researcher



**Emma Jarvis**  
Qualitative Researcher



**Jordan Rodger**  
Learning Designer



**Pablo Langa**  
Corporate Education  
Tech Advisor



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