

From Transactional to Strategic

How WFG is Modernizing HR with
McLean & Company

Executive Summary

When WFG engaged McLean & Company, its HR function was paper-based and largely transactional. Nearly five years later, the organization has digitized its HR operations, launched a DEI strategy, stood up a comprehensive employee listening program, and put its HR team through a four-day strategic realignment workshop. Under the leadership of Chief HR Officer Heather Krablin, WFG has used the full breadth of its McLean & Company membership to transform how HR shows up for the business.

Challenge

WFG's HR function had historically operated in a highly transactional way. The challenges were both structural and cultural:

An archaic HR infrastructure: everything was paper-based, requiring a full digitization effort before modern HR practices could take hold.

No employee feedback programs: there were no engagement surveys, exit surveys, or new hire surveys in place when she arrived.

A DEI strategy that needed building from scratch: the organization had not yet embarked on a formal DEI journey.

An HR team that thought transactionally: shifting the team toward strategic thinking and a shared sense of mission required intentional investment.

A skills gap within the HR function: team members needed development in areas ranging from strategy to foundational HR disciplines.

Succession planning and leadership development: WFG had an aging workforce and no formal succession plan in place.

Layered on top were the broader challenges facing HR leaders across industries: digital dexterity, AI readiness, employee engagement, and change management.



Heather Krablin is the Chief HR Officer at WFG (WFG National Title Insurance). Her mandate spans HR, compliance, and people strategy. WFG has been a McLean & Company member for approximately three years.

The McLean & Company Solution

Over three years of membership, Heather has drawn on McLean & Company across multiple dimensions: workshops, survey programs, research resources, training, events, and executive counselor support.

HR Strategy Workshop

One of the most significant engagements was a four-day HR strategy workshop that brought WFG's entire HR team together to define its mission, values, and strategic direction.

"We utilized the HR strategy workshop. That was a four-day deep dive into who we are as a group. What do we do best? Where are our focuses? Where do we spend most of our time, and then what do we want to do? It really walked us through those three elements. And in that workshop, we were able to say: this is our mission. This is what we value. This is what we're good at. This is what we're going to strive for, and this is how we're going to get there."

Employee Listening Programs

WFG launched a DEI survey and strategy, followed by new hire and exit surveys, and is currently running its first employee engagement survey, all using McLean & Company's tools and methodology. What stood out to Heather was not just the survey itself, but the methodology around acting on results. McLean & Company introduced the idea of following survey results with employee focus groups, so that employees are not just asked for feedback but brought into the solution.

"What I'm really looking forward to is, as we get to those results, part of the action plan that we've put in place is we're going to do a workshop and go over what are those themes. And then create focus groups. We've asked the employees what they think, but let's also involve them in being the solution. That was an idea that McLean brought to us as part of facilitating that. I haven't had that experience in my past."

Leadership Training and HR Development

WFG has rolled out McLean & Company's Management Fundamentals for new and transitioning managers, and the Elevate HR training program for HR team members who need foundational development.

"If you have team members that just need a little bit more education, Elevate HR is a great program. And for Management Fundamentals, when we have new people coming into the organization, we've utilized that training, whether that's for new managers or a refresher for those coming into an organization from another one."

Executive Counselor: A Strategic Sounding Board

The relationship with her executive counselor, Marty, is something Heather returns to consistently as one of the most valuable aspects of her membership. As a CHRO without a peer inside her organization, having someone she can call on between scheduled meetings is meaningful.

The McLean & Company Solution

"What I value most about my relationship with Marty is really just her wealth of knowledge. She's been in a similar role in a variety of industries. It's a relationship where I can confide in her and be myself. It's nice to have that person I can call, and not just our scheduled monthly meetings. I can send her an email or a text and say, 'Hey, what do you think?' She's always there to be my advice and counsel when I need her."

This has been especially valuable when navigating succession planning and leadership development, helping Heather think through how to present ideas to executive leadership and build buy-in across the organization.

CHRO Events and Peer Community

Heather also values McLean & Company's events, particularly the CHRO-specific gatherings, which offer something she cannot easily find elsewhere: a smaller, peer-level community where shared challenges can be discussed openly.

"The event that I find most impactful for me is the CHRO event, where it's a smaller group of people. You really get to network and share a lot of the same challenges. People are at different stages, and you can really pick people's brains about what their best practices are or what works at their organization."

On-Demand Research

Beyond the structured programs, Heather highlights the value of McLean & Company's research library for day-to-day HR work. The ability to search and access resources independently, without needing to schedule an engagement, has proven useful for her team.

"McLean does a very good job at providing research. You don't always have to engage with a team or have a workshop and have a four-day event. You can utilize it yourself, or your team can look at things like job description writing or executive summaries, how to present to an executive team your idea on succession planning or leadership development. Those resources are at your fingertips, and you can navigate and search on your own at your own time."

Outcomes

Over nearly five years, WFG has transformed its HR function in ways that are both visible and deeply cultural:

Full HR digitization: moving from paper-based processes to digital systems has freed up significant team capacity and modernized how the organization manages its people.

DEI strategy launched: WFG now has a structured DEI program, having started from scratch.

Employee listening programs in place: new hire and exit surveys are active, with an engagement survey and follow-up focus group process currently underway.

HR team strategic realignment: following the strategy workshop, the team now has a defined mission, strategic pillars, and a shared understanding of where to focus.

Outcomes

Talent development in motion: Heather has promoted and developed team members internally, with one direct report in particular stepping up significantly after being elevated into a leadership role.

Succession planning underway: a formal succession planning process, which did not exist before, is now being built.

On what gives her a sense of progress and purpose:

"When I started, everything was done on paper. We've digitized HR and I've really been able to bring some different thinking to the organization because I come from a different industry. Part of that is, if I were to ever leave, my thing is: what is the legacy I leave behind?"

Advice to Other Leaders

Heather's advice for HR leaders considering a McLean & Company membership is grounded in how she uses it herself, and what she would tell someone just getting started:

"McLean does a very good job at providing research. You don't always have to engage with a team or have a four-day event. You can utilize it yourself or your team can too. Those resources are at your fingertips, and you can navigate and search on your own at your own time. That's been very helpful when you just want to quickly look something up."

She also points to the relationship layer as what truly differentiates the experience:

"What I really enjoy is the relationship that we have with McLean, whether that's my relationship with the executive counselor or our account reps. We can call them and they are very supportive and always try and find solutions for us."

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