

# A Revamped Leader Journey

## THE CLIENT

This global financial leader offers services in banking, wealth management, securities and capital markets, as well as personal and corporate trust. They build relationships with their clients by offering insights and a customized approach. Their client base ranges from multinational corporations and institutional investors, to individuals and small to medium-sized businesses.

### Pain Points:

- Dated training
- Change in Culture
- Biased performance reviews
- Global Silos

### Key Outcomes:

- A winning culture
- A unified, global organization
- Agility
- Communication
- Trust
- Customer Satisfaction

## CHALLENGES

With the company undergoing a change at the senior level, there was a renewed focus on accountability and a passion for increasing employee engagement. In order for the company to achieve their goals, they first had to address their global organizational personnel issues including:

- Culture and climate alignment – the desire to create a day-to-day climate consistent with a high accountability culture.
- Inflated performance reviews – internal research confirmed that performance reviews were being given with a clear bias towards being positive.
- Dated training program – the company had an existing training program for front-line managers that was in need of a strong refresh.

## GAPS

When reviewing the company's existing training program, *oneRIVER*, it was found to be insufficient to address the organizational issues. There were few learning methodologies used, little cohesion from one topic to the next, and a lack of context and relevance to the financial services firm. Simply stated, the program was generic and feedback from participants suggested little confidence in the program's ability to help them succeed and managers were not given the tools to hold their employees to the highest standard of accountability. Amazingly, the company's former training partner did not leverage the *oneRIVER* program name in the course of the program – denying the participants a rich metaphor for their journey as leaders.

## JMREID GROUP'S CUSTOM SOLUTION

Upon observing JMReid Group's program *The Edge: The Art and Science of Relationship Building* the client immediately appreciated the use of high quality visual panels, the high level of interactivity and an economic model not driven by intellectual property fees. They selected JMReid Group to redesign their *oneRIVER* program with the key criteria of driving a culture of

accountability, contextual to the firm and highly engaging for participants. The resulting program, *oneRIVER* uses rich metaphor to prepare participants to lead a changing business in a changing industry. The program begins on the mountaintop, the source of the river, where they envision the expedition strategy and plan their journey by:

- Reading the river and developing a broad perspective of its influences
- Anticipating the downstream hydraulics, recognizing their effects on craft and crew
- Setting the navigational rules and the communication protocols
- Sizing up the crew, thinking about how best to prepare them to set and adjust their course
- Discovering and testing new ways of circumnavigating the rocks and the turbulence
- Developing techniques to retain buoyancy in rough water
- Taking advantage of calm water to celebrate and plan for what's next

The program itself is a journey from pre-work (including individual self-assessments), to the classroom experience, to the formation of learner cohorts using a matching algorithm to balance diversity with common interest. The learning cohorts then choose their sustainment path. The power of learner choice in the sustainment process helps drive a high level of involvement and engagement post-classroom

### CUSTOMER RESULTS

The client partnered with Metrics that Matter in assessing the program's impact. After a number of participant groups cycled through the learning process, the following client outcomes were noted:

**High learner engagement, improved learning sustainment.** *Employees noted that the training in leadership skills was particularly engaging and memorable.*

*Follow-on: 100% of front-line managers reported that learning effectiveness was high, both in design and delivery.*

**Focused on applicable leadership skills,** *allowing front-line managers to address issues, hold employees accountable and increase productivity.*

*Follow-on: Front-line managers reported that the training would have a significant impact on increasing productivity and employee engagement.*

**Context is king.** *This principle allowed employees to easily grasp the skills being taught and apply them, fluidly, to their own positions.*

*Follow-on: Learners reported that everything could be immediately applied to their current position.*