Managing a Technology, Process & Culture Change

CASE STUDY

GLOBAL FINANCIAL SERVICES FIRM

SNAPSHOT:

👤 THE ORGANIZATION

- Investment Banking and Wealth Management
- 1,000+ employees

👤 LENGTH OF PROJECT

- 14 months

👤 OUR EXPERTISE

- Change Management Consulting and On-Site Execution Support
- Communications & Training Advisory

👤 OUR TEAM

- 1 Project Lead
- 1 Project Manager
- 1 Strategic Advisor

BPI group

The Global Leadership, Talent & Transition Experts

THE CONTEXT:

Our client had a strong legacy of success, but needed to position for scalable growth and address increasingly competitive and operational pressures, including implementing an industry-leading technology platform to enhance service for customers and two business units. Key goals included enhancing process efficiency, integrating and adopting new systems, and creating consistency while maintaining flexibility and customization across business units. The organization had limited experience navigating change and anticipated major adjustments.

OUR APPROACH:

- Objectively assessed change management opportunities, gaps and risks; identified cultural and process-focus areas to address going forward
- Developed and executed the change strategy, with detailed communications, training, and engagement plans, to build awareness and commitment
- Engaged leaders in change efforts to ensure successful adoption of the new system and effective, consistent messaging to employees
- Developed tailored communications including presentations, talking points, FAQs, readiness guides and an intranet portal with resources; engaged a team to act as change champions among their peers
- BPI group was asked to lead the training workstream after demonstrating exceptional project management skills and expertise. We mapped training needs, recommended an approach to complement the vendor's system training, and created the full training plan

RESULTS:

- Successful conversion to the new system and processes with teams well-supported by onsite support, training, and real-time communications.
- Increased change management acumen and cooperation among business unit and functional leaders made them capable for future change initiatives.
- Effective internal and customer-facing communications created consistency and clarity while addressing the unique needs of each audience.
- Employees and managers were informed and engaged around the rationale for change and what to expect, and ultimately well-prepared for change.
- The newly created robust internal training programs can be used for future learning and onboarding.

Connect with us today. We're here to listen.
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