

CASE STUDY: Delivering a Platform for IT-driven Transformation

Summary of our work with a multi-jurisdictional financial services company, transforming itself via the implementation of a leading-edge IT platform

Consultants: Nick Mayhew & Esther Cameron | **Keywords:** IT-led change, Structural Alignment, Leadership skilling, Offsite; Performance Improvement; Post-Acquisition Integration; Behaviour Change; Coaching; Financial Services | **Contact email:** nick@integralchange.co.uk

Client: Chief Executive, multi-jurisdictional financial service business, based in London

Client issue: Seeking specialist support, post-Big Four scoping, to craft and facilitate the organisational change necessary to successfully implement an industry-leading IT system, enabling straight-through processing and additional efficiencies across multiple locations.

Duration/Scope: 18 months, working via a monthly retainer averaging 14 days pcm

Value delivered:

- CEO approach & behaviours transformed – delivering clearer vision, strategy & management process; and obtaining an enhanced ‘mandate to lead’ the IT-driven transformation initiative among highly sensitised stakeholders;
- restructured management teams & related governance bodies – delivering higher-quality, more accountable decision-making, with increased capacity to negotiate the complexity of the IT-driven transformation process;
- a higher-performing organization – showing quantifiable progress against 12 ‘performance improvement objectives’ – such that long-term post-acquisition integration (PAI) & efficiency goals can be realized
- transformed IT-project governance, leadership and engagement with the wider organization;
- improved morale, relationships & collaboration across previously siloed parts of the organization (= ‘culture change’ & PAI, by stealth!);
- increased leadership confidence and skills across three management levels

Ways of working:

- strong, trusting relationship with Chief Executive, built by offering challenging levels of feedback plus highly attuned forms of support
- ‘partnering’ with other leaders across the organization, including HR, enabling them to trust us with confidences, and us to provide highly responsive forms of advice & coaching; also ensuring skills-transfer and capability-building to sustain the work on our departure
- combining conceptual, strategic change advice with skilled inter-personal and group-dynamic interventions
- working emergently, via quarterly ‘review & planning’ cycle, responding to feedback loops as the change progressed, to deliver highly bespoke service;

- working principally as a male-female consulting ‘double-act’, offering uniquely wide-ranging, yet intimate, forms of support across three leadership levels

Key elements of our work:

i) *Advisory partnering & support*

- 40+ diagnostic interviews & challenging feedback to senior leadership
- regular 1:1 meetings with CEO alone, and 2:2 meetings together with Offshore MD
- ‘surgeries’ enabling other leaders to access confidential advice & support

ii) *Change interventions*

- organization re-design and accompanying engagement/communication process
- ‘thought-papers’ on specific aspects of the organization and its operation
- 2-day transformative offsite for senior management in Sussex hotel: design & facilitation in partnership with key leaders
- Governance set-up of IT programme and on-going feedback/advice/ communications support to Business Lead and Programme Manager
- convening ‘tough conversations’ to address particularly stuck issues
- partnering HR to deliver improved performance management process and grow strategic capability
- landing a ‘Performance Improvement Charter’ (PIC) owned by senior leadership
- facilitating reviews of progress against the PIC – including use of ‘Management Team Scorecards’, enabling various forms of team self-appraisal & development
- supporting individual performance review conversations and an executive exit process

iii) *‘Just-in-time’ capability- & skill-building*

- regular 1:1 coaching (every 6 weeks) for CEO and top team
- design and delivery of a modular course of 90-minute ‘leadership skilling’ sessions, in response to demand from the business
- ‘live’ partnering/feedback/support for individual leaders in preparation for specific meetings and events

Testimony: *“Integral Change had a major impact on both me and my leadership team – in terms of leading with confidence, improving our group decision-making dynamics and clarifying our leadership responsibilities... We are undoubtedly a higher performing organisation following our work with Nick and Esther, and our chances of successfully implementing a transformative IT solution are hugely increased as a result.”* **Chief Executive**

Contact: For more information about this piece of work, contact Nick Mayhew, Director, via nick@integralchange.co.uk or +44 (0)7753 620811. Conversations with the client quoted above can be arranged, if appropriate.