

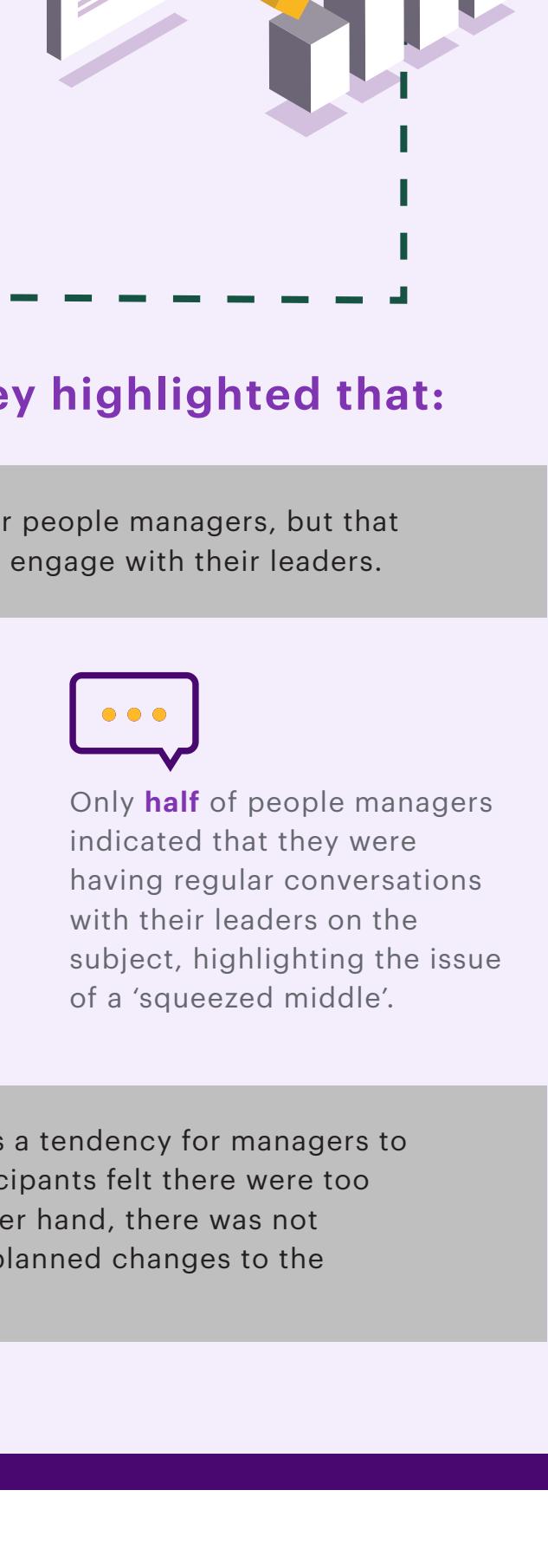
# Supporting Managers to Navigate Change and Transformation at a Financial Services Organization

Saville Assessment  
A WTW Company

## The Challenge

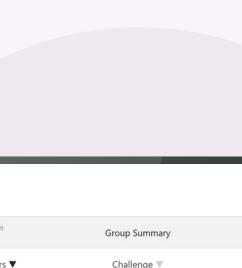
An Employee Engagement Survey run by a Financial Services Organization identified the need for development in order to be ready for upcoming organizational change. Furthermore, it highlighted that, due to changes brought about by the global pandemic, employees were less likely to uptake or invest in development opportunities.

We worked closely with them to devise and implement a development initiative to address these issues and help employees adjust to business-critical changes that were planned.

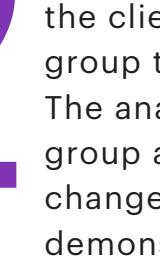


### The results of the survey highlighted that:

Individuals were engaging with their people managers, but that people managers were less likely to engage with their leaders.



**3 out of 4** people were having regular conversations with their managers about the impact of COVID-19 on their work and wellbeing.



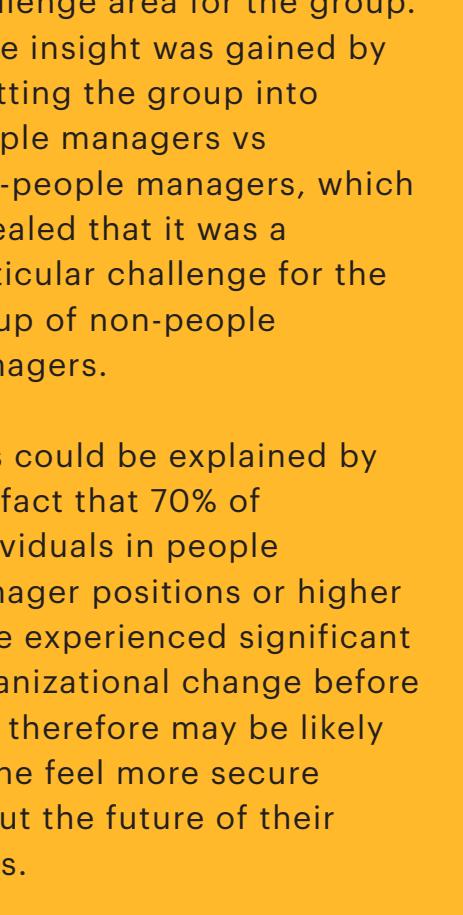
Only **half** of people managers indicated that they were having regular conversations with their leaders on the subject, highlighting the issue of a 'squeezed middle'.

Some individuals felt that there was a tendency for managers to over-communicate. **2 out of 3** participants felt there were too many meetings, but that on the other hand, there was not enough communication about the planned changes to the business.

## The Solution

Triggered by the results of the survey, we put together a 4-Step modular development program:

**1** The entire division completed our **Wave Focus Styles** personality questionnaire and received a copy of their **Coaching Report** to encourage self-directed coaching and development actions, addressing the trend regarding self-development highlighted in survey.



**2**

Using our **Wave Analytics** tools, the client was able to identify group trends in the Wave data. The analysis highlighted that the group as a whole was much less change-oriented and less likely to demonstrate the required resilience.

This could be a significant challenge for the group, given the upcoming business-critical changes. This highlighted the need to apply our **Building Resilient Agility** lens on the data.

**3** The unique **Building Resilient Agility** model can help organizations identify and develop individuals who are more likely to be effective during times of change and transformation. Using the tool, sessions were run with the Leadership team to help them plan for upcoming changes.

### The data from the group profile highlighted key areas for action:

#### Enabling New Ways of Working

Data showed a wide range across the group. The group are more focused on producing output and managing tasks. Areas highlighted as a challenge were "Providing Insights", "Making Decisions" and "Developing Strategies". This was not surprising given the team's focus on client deliverables, where it is important that tasks get delivered and managed in line with the expectations of clients. Furthermore, only relatively few individuals were in senior leadership positions.

#### Staying Connected

Interestingly, the group was again quite split in this area. There was increased challenge in the areas of interacting with people (possibly unsurprising in light of Covid), but a strength in team working was also revealed.

#### Maintaining Drive

Less focus on "Empowering Individuals" was found; this linked to the results of the Employee Engagement Survey which highlighted the pressure on people managers.

#### Dealing With Change

This was revealed as a key challenge area for the group. More insight was gained by splitting the group into people managers vs non-people managers, which revealed that it was a particular challenge for the group of non-people managers.

This could be explained by the fact that 70% of individuals in people manager positions or higher have experienced significant organizational change before and therefore may be likely to feel more secure about the future of their roles.

**4**

The actions identified in the session with the leadership team were cascaded down to people managers. These people managers were then equipped with the necessary information to run small group sessions with their teams based on the data.

All team members were also provided with a copy of their **Building Resilient Agility** report in preparation for the upcoming structural changes.

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## Benefits to the Organization

Tangible actions were put in place following the group session with the leadership team to support all and provide people managers, in particular, with lasting positive change.

#### ENABLING NEW WAYS OF WORKING

'Help us help you' resourcing sessions were planned with the team to help ensure effective workplans continue to be delivered, but also to think about how resources can be best used in upcoming business-critical change.

#### DEALING WITH CHANGE

A monthly team round-up was implemented to share important information about upcoming change and ensure leaders provide teams with time to ask questions. Leaders also focus on sharing positivity about the upcoming changes.

#### STAYING CONNECTED

To avoid over-communication and overload of calls and meetings, the concept of a monthly round-up email summarizing information from across different channels was introduced.

#### MAINTAINING DRIVE

As the people managers were identified as the 'squeezed middle' and in need of additional support empowering their teams, the organization created a communication plan which encouraged leaders to check in with their reports.

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