

Improving corporate performance through behavioural change

A case study of the establishment of a business change programme within a UK-based, international bank. David Loveless describes his experiences as the programme manager brought in to help the UK staff “live” the five new corporate values.

The Background

The top management of the bank had identified that a ‘step-change’ in performance was required to maintain its competitive position in the 21st century. A global change programme was launched to promote an enhanced performance culture within its staff, based around five new corporate values. The programme was planned and monitored centrally at the highest level, but responsibility for local implementation was devolved to country CEOs.

For the UK, this was complicated by the presence of a number of Head Office functions run by executives as or more senior than the country CEO. To counter this, the UK CEO set up and chaired a management forum comprising 13 key individuals responsible for all the staff within both the business and HO functions.

The Challenge

To implement the change programme within the UK, a country perceived to be suspicious of such initiatives; against a backdrop of strategic programmes that included outsourcing and ‘rightsizing’ some of the UK departments.

The Approach

The management forum appointed a working group to examine the best way to implement the values in UK. Its recommendations included a series of activities and events to raise awareness of the new corporate values and the appointment of a full time programme manager (David).

Reporting directly to the UK CEO and working hand-in-hand with Communications and HR, David developed the overall framework within which the various businesses and functions built their plans. He mentored members of the management forum and facilitated cross functional communication wherever possible.

David drew on the experiences of other countries within the group that were further advanced in their implementations together with external research on companies recognised as having conducted “best practice” programmes of a similar nature.

A tailored programme was then designed that had two discrete components:

- Enabling activities designed to create the correct change environment with staff ready and willing for change;
- Functional work-streams designed to engage all staff in ‘translating’ the values into tangible changes in behaviour, targeted at improving performance

Implementation - enabling activities

In order to achieve change, an environment for change had to be created. Staff had to feel good about the bank and its management and be proud to be part of the organisation. A poll of the staff revealed a desire to be involved more in local community work and to feel that the bank was meeting its environmental responsibilities. There was also a general feeling that there was little socialising after work unlike some of the other more high profile countries in the group.

A number of existing separate initiatives were pulled together and re-focused. The existing community activity supporting local schools was re-energised and re-launched. The environmental programme was kick-started with an activity week that involved all staff in voluntary work, competitions etc. The sports and social area was re-examined with a new enhanced service contract being negotiated for the staff gymnasium. Communications were expanded and dedicated web space was made available on the company intranet. Success stories were celebrated and recognised.

Implementation - functional work-streams

There were eight functional work-streams each headed up by a member of the senior management team with each one having a change implementation manager nominated for day to day championing, planning and control.

Each work-stream developed its own plan with assistance from the programme manager as required. Focus groups were used to allow ideas to be generated bottom-up and discussed freely. Larger interactive workshops were used to 'test' the ideas with management and other groups before deciding the best way forward. A detailed implementation plan was prepared and sent to the programme manager.

Reporting to the overall programme manager was on a monthly basis against agreed milestones and summarised on a dashboard that also highlighted risks and issues. Costs were primarily absorbed at the departmental level. Plans were exchanged between work-stream managers who were also encouraged to meet and assist each other.

To reduce the threat of cynicism the staff needed to be confident that the management of the bank were looking after their interests and fully behind the values themselves. Master classes were planned where Senior Management had the opportunity to talk about the values and give examples of how they could be harnessed to create better performance.

Once the programme was established, day to day management was handed over to the work-stream managers with Communications assuming the controlling role.

Lessons learned

- Research is time well spent and will help you to identify and avoid pitfalls in your programme. It is odds-on that someone has faced a similar problem before and this knowledge needs to be leveraged
- Sponsorship and ownership of change must come from the top. In this case, the group CEO was driving the programme and constantly reinforcing the message through his own behaviour. This helped management and staff to engage when they realised that (a) this initiative was not going to go away and (b) it was non-negotiable
- Use the enthusiasts to help the change. Choose your best and most energetic to be your change agents as these are more likely to sway the majority.
- Engagement of all concerned is essential for sustainable change to be successful. The use of focus groups and interactive workshops enabled staff to present and discuss their ideas prior to recommending those to be adopted. Once these have been accepted staff are much more likely to promote them.
- Change must be measurable and linked to improved performance for it to be worthwhile. In this case every member of staff would have a subjective grading on how he/she was espousing the new values in their day to day work. This grade would be taken into consideration at the time of remuneration against performance.
- Beware initiative overload. Whilst initiatives are great ways to promote change they can be confusing if there are too many of them. Keep the messages simple.

TCL have many years of experience in helping organisations solve their programme and project problems including cultural programmes like the one described above. TCL offer a range of other programme and project solutions including:

- Independent reviews and assurance
- Programme and project office set-up and running;
- Feasibility study and business case production;
- Methodologies and training
- Programme and project control systems;
- Programme and project implementation services;
- Programme and project governance structures;
- Contract/interim resourcing.

Contact us for an informal discussion on how we can help your programmes and projects deliver greater benefits.

Transformis Consulting Ltd
Waterloo Business Centre
117 Waterloo Road
London SE1 8UL

David Loveless 020 7902 1152
david.loveless@transformisconsulting.co.uk
Allen Ruddock 020 7902 1153
allen.ruddock@transformisconsulting.co.uk

www.transformisconsulting.co.uk