



APEX

ACHIEVING PERSONAL EXCELLENCE

How to achieve cultural change and
increased performance in a global
investment bank where demand
outstrips resource

transform 
PERFORMANCE
international



Global Investment Bank

“As a group, we are under tremendous pressure and have made commitments to reduce our operating costs.

We can do that by simplifying our infrastructure, and another important dimension, is that we each of us can become more personally productive and get more done during the day and can work better with one another.”

CIO, Investment Banking Division



APEX



Industry

Investment Banking



Services

IT Services supporting the investment banking system



History

Previously the team was two separate teams managed and measured exclusively

Overview

“If every APEX programme participant has 30 minutes less email to read each week, this would equate to a saving of 49 full time employees ... and £3.6 MILLION of value!”

Challenges

Problem

Our client had issues in integrating people from two Technology Divisions of a merging bank. The people from these new teams were tasked with delivering results while facing adverse market conditions and in the face of constant, negative public dissatisfaction plus deeply hostile press criticism.

Before Transform Performance

This multiple pressure was adversely undermining the mindset and attitudes of many employees and seriously affecting their drive and motivation to perform.

Reasoning

Now that the teams were being merged, the CIO needed to have a consistent high performing team demonstrating effective behaviours to achieve more output with the same number of people.

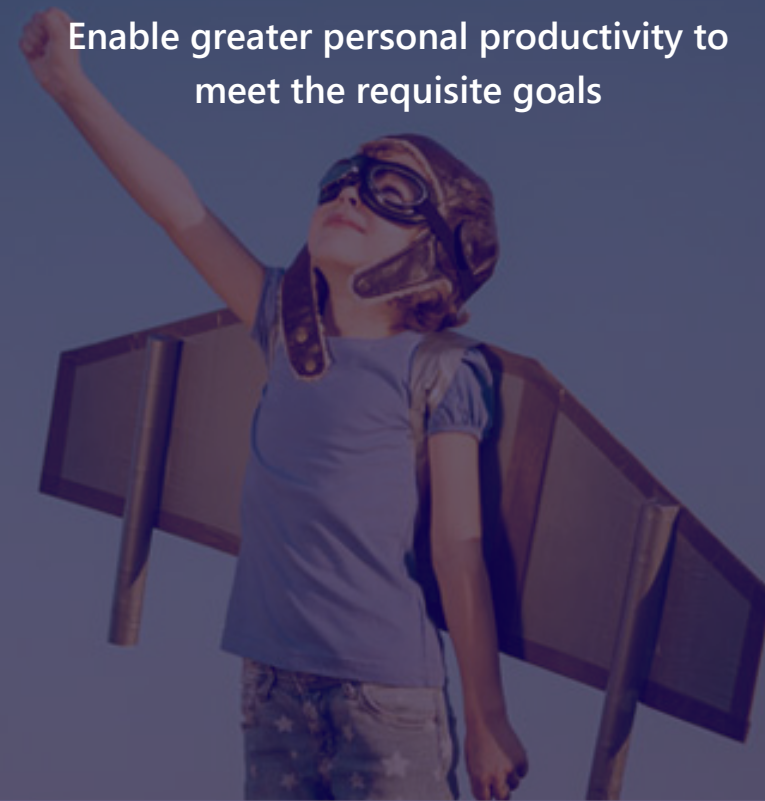
Goals

Re-energise individual attitudes and mindsets

Refresh personal skills

Empower people to make a difference

Enable greater personal productivity to meet the requisite goals



Solution

Finding Transform Performance

Transform Performance (TPI) were a preferred supplier at the bank. The CIO attended a pilot from another vendor and stopped any further engagement. TPI were invited to present to the two CIO's and our proposal appealed to the different mindsets. One wanted best practice and the other wanted to understand the psychology of why intelligent people do what they do.

Proposed Solution

The APEX programme was structured by TPI as a series of training experiences. Budgetary stipulation meant that these had to be short, sharp and to the point. APEX had to reflect the desired operating culture in five key areas: meetings, time management, feedback, communication and cross-cultural engagement. And the creative format, believed to be totally unique, comprises two tiers of individual development. The first tier is a half-day instructor-led workshop, called "Springboard", followed by the second tier of strategic "Momentum Builder™" (attended every 4-6 weeks) to "reinforce, sustain and extend the learning".

After Transform Performance

Fewer emails and fewer BCC to tighten the train of communication and control. More effective meetings – on time, with clear objectives, aims and action points with accountabilities. Better, clearer feedback given and requested. Tailored communication based on the receiver's role, temperament and agenda. Communication adapted for different cultures and audiences.

"Our client really acted in partnership with us to enable this change and for them to hit their ambitious global goals. We are delighted with the results and the positive feedback continues to come in."

Ian Mills, CEO of Transform Performance International

Results

As a direct result of APEX, productivity has decidedly improved and broader levels of engagement, communication and support have significantly enhanced people's own levels and understanding of personal excellence.

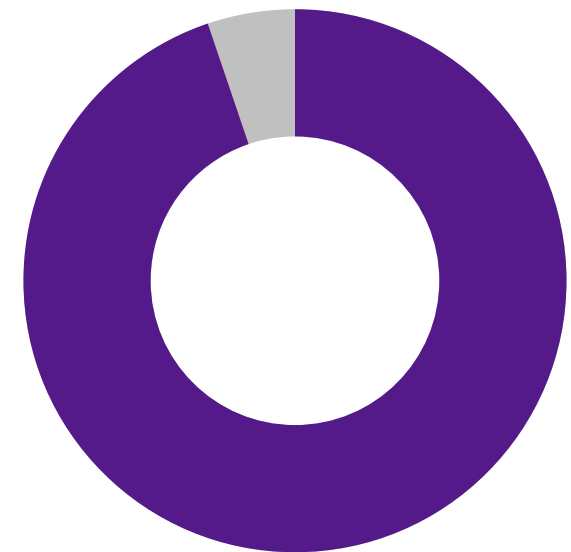
From the bank's perspective the APEX programme has:

- Increased productivity
- Upgraded working habits (effectiveness of meetings, standards of communication, improved feedback patterns)
- Empowered staff to pursue collective improvements
- Provided greater networking connectivity between programme participants

For individuals, their immediate payoff was in a better understanding of themselves and of other people's behaviours and how they can more easily and effectively interact with and influence others. Each person is empowered to make decisions, to challenge co-workers in the quest for improvement and to advance their own development on the road to achieving and developing new levels of personal excellence.

Participants who Agree vs Disagree

Percentage of participants who identified positive and clear actions



94% Agree

6% Disagree

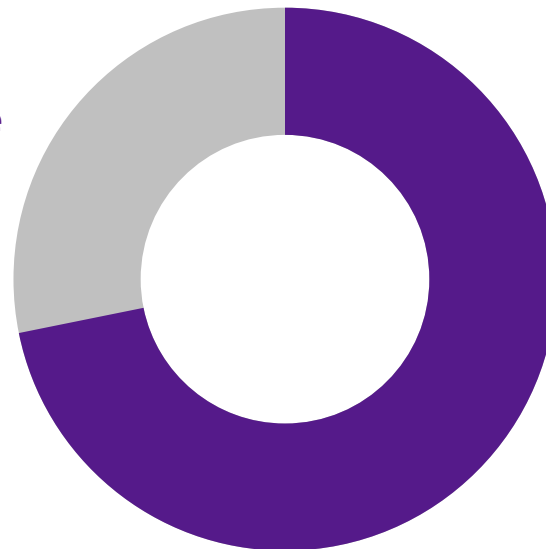
Results

The impact of the programme is clearly visible in three distinct ways:

1. Positive results reflected in enthusiastic feedback from participants on completion of the Springboard workshop and from subsequent Momentum Builder sessions.
2. Information gathered from a change evaluation of identified improvement at individual and a division-wide levels.
3. The fact that in the construction of their Global Academy, the Technology Division has included the APEX Springboard in the orientation phase and the topics from the Momentum Builders into their main curriculum. APEX has now become part of the organisation's own ongoing curriculum.

Participants who Agree vs Disagree

Percentage of participants surveyed post-workshop have observed changes in themselves or others in the work environment:



73% Agree 27% Disagree

Transform Performance International LLP

Transform Performance is a performance transformation consultancy specialising in working with global clients to change culture, behaviour, mindsets and beliefs. We partner with our clients to unlock their potential for delivering business results that matter with the people who make it happen.

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