

Putting the Customer First:

A Leading US Bank Immerses Leaders in an Innovative Digital Experience to Accelerate Strategy Execution



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A leading United States bank has grown to become one of the largest banks its region, providing a range of banking products and solutions to commercial, personal, and affluent customers across 600 branch locations and over 1,300 ATMs. Going forward, the company is dedicated to leading the industry forward by focusing on the customer first.

As the financial services industry continues to transform as a result of globalization, structural changes, and increased regulation, the bank is positioning itself for success. To drive further growth and accelerate results, the company is committed to distinguishing itself as the bank through exceptional customer experience. However, success depends on the effective implementation of the company strategy and the consistent application of sales and leadership best practices, a challenge for an increasingly expansive organization with over 14,000 employees.

Strategy Execution Started by Getting Digital

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The organization partnered with [BTS](#), a leading strategy implementation firm, to develop a high impact, digital strategy execution program. To ensure maximum applicability and impact, BTS consultants worked closely with the company's executives to craft an interactive experience aligned to and reflective of the key strategic priorities. The customized initiative was designed to:

- Deepen the organization's sales culture
- Improve channel migration by shifting customer interaction time from transactional to consultative
- Strengthen collaboration with linkage partners to create productive customer interactions
- Facilitate proactive, focused control over branch activities, not just reactive responses to issues
- Drive employee engagement through consistent, disciplined and data-focused coaching

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- Integrated iPad crowdsourcing questions with the results shared real time
- High impact simulation experience that was scored with a "heatmap" leaderboard streaming results as teams executed decisions
- Alternate iPad views for table leaders and regional facilitators with the ability to see the aggregate of participant decisions
- 300 iPads with pre-loaded videos running on a completely closed local Wi-Fi network

Simulated Experience, Tangible Impact

The immersive, interactive digital experience effectively engaged diverse groups of leaders, integrated their participation into a comprehensive and impactful experience, and delivered tangible value.

Branch Managers: Through the iPad-based experience, teams of branch managers were given the opportunity to step outside of their traditional roles, collaborate in new ways, and explore the company strategy in a risk-free environment. Assuming the role of a branch manager, individuals were challenged to make difficult trade-off decisions, recognize the interdependencies between key metrics, and drive strong execution, effectively leading a team of employees to success.

Through valuable first-hand experience, branch managers were able to recognize the value of the company strategy, disseminate best practices, and build the critical business, sales and leadership skills for effective branch management.

Regional Managers: Sitting with a team of participating branch managers, regional managers engaged with their own differentiated iPad interface, explored the decisions made at the table, and applied the real-time data to facilitate discussions among the group and illuminate key learning points.



Regional Presidents: Moving throughout the space and observing the teams within their own business region, presidents collected the decisions from the larger group through their unique iPad interface, observed how they ranked in comparison to other regions, and aggregated the data to address the group and build alignment and capability across the region.

High Expectations Exceeded

For the leading United States bank, high expectations were exceeded. The strategic program was a huge success from the perspective of the participating branch managers, regional managers, regional presidents and the broader organization. Going forward, the manager's wholehearted comprehension of the strategy and improved execution skills will aid the execution of the company's growth initiatives and future success in becoming the leading customer service institution.

The positive momentum is expected to continue. The strong results of the initial strategy execution initiative have inspired further application to assistant branch managers.

About BTS

BTS focuses on the people side of strategy, working with leaders at all levels to help them make better decisions, convert those decisions to actions and deliver results. At our core, we believe people learn best by doing. For 30 years, we've been designing fun, powerful experiences™ that have profound and lasting impact on people and their careers. We inspire new ways of thinking, build critical capabilities and unleash business success. It's strategy made personal.

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