



Synergy Case Study: Leadership Transformation

Synergy Develops Leadership Capability of ASX Top 20 Financial Group

Key Facts:

Target Audience:

Middle Managers and Team
Leaders

Program Duration: 6 months

Programs Delivered:

- Personal Leadership
- Performance Leadership
- Team Leadership
- Group Process Skills
- Change Leadership
- Consultative Leadership
- Roles and Accountabilities
- Individual Coaching

Our Client

A major financial services organisation that provides life risk insurance, wealth management, financial planning and trustee services across Australia and New Zealand.

The organisation employs approximately 680 people within Australia. Employees are distributed across 6 locations around the country with the majority located in Sydney. Following a merger in March 2007, the organisation is now part of a Global Group.

The Goal

In 2006 the organisation went to the market looking for a learning partner to develop its leadership capability. This was an opportunity to create a unique program that directly aligned with the organisation's Leadership Competencies thus supporting it in meeting its 'Our People' commitment.

Due to deregulation the finance industry had been through a period of profound change. The traditional market had been replaced by a new dynamic and competitive trading environment which required a different approach and a new range of competencies for its leaders.

At the time of engagement, the organisation's Executive team had recently undertaken a project to define the building blocks that make them unique and essentially re-map the company's DNA. The project identified key areas of focus; and the actions required to achieve success over the next three to five years.

The successful learning partner had to not only develop a comprehensive leadership training program but to weave the DNA of the organisation throughout the curriculum.

The criteria for selecting a successful provider was based upon:

1. A solution that was directly aligned with the organisation's leadership competencies. The solution had to be highly practical, skills based, employ a number of training approaches and provide relevant case studies
2. Vendor's ability to customise the program based on each employee's individual development needs
3. Demonstration of previous results with a similar assignment
4. An understanding of the Financial Services Industry and their business
5. Quality and fit of facilitators

The organisation wanted its 40 Team Leaders and 50 Managers to become better leaders with measurement against defined Leadership competencies. The organisation wanted to invest in its leadership team to truly maximise their potential and cement the DNA into the culture.



Synergy Case Study: Leadership Transformation

The Synergy Solution

¹The Synergy Learning Extranet is an on line portal which provides easy and immediate access for participants and their managers to Synergy's pre and post workshop materials including tools, briefings, white papers and transfer learning activities

Synergy's objective was to design and deliver a customised, pragmatic and skills-focused leadership curriculum to build effectiveness within the two distinct leadership groups. The solution would also need to evolve over time according to shifting priorities of the business.

The Synergy Leadership Transformation Program™ is about assisting leaders in building and executing strategy to create sustained performance across Financial, Customer, Process and People metrics. The execution of strategy involves developing people, managing business plans, improving core systems/processes and the effective utilisation of key technologies.

The Synergy Group Solution was designed to equip leaders with the capability to;

1. Align their people to the strategy
2. Shape constructive cultures and,
3. Develop the competencies of their teams

The multi-phased program, supported by Synergy's Learning Extranet¹, built the skills and competencies over a 6-9 month period. In between each module, participants were provided with White Papers and Transfer Activities to cement the learning.

The areas of coverage included:

- Personal Leadership
- Team Leadership
- Group Process Skills
- Consultative Leadership
- Change Leadership
- Performance Leadership

In order to promote increased self-awareness, an essential ingredient for an effective leader, the program incorporated the organisation's own 360° Assessment tool. Each participant received their feedback pre and post program to increase the richness of the learning experience. Results were discussed in the training room along with action planning to enhance long term behavioural change.



Synergy Case Study: Leadership Transformation

The Results

The "Outstanding Leaders" program is now in its sixth cycle. Each new program is introduced by the CEO and graduates from previous programs; This reinforces the importance of the program and clearly positions where the program fits within their strategic direction.

The content has evolved over time to reflect the changing business environment in which the organisation operates.

Client Feedback

The organisation's Learning & Development Advisor commented on the impact of the program:

"We engaged The Synergy Group to deliver a consistent, skills based approach to developing our leadership capability at the team leader and middle manager level. From the initial scoping exercise till now Synergy has been instrumental in designing a program that meets our needs. Post program reviews have enabled us, with Synergy's guidance, to fine-tune the program according to both learner and organisational needs.

This has made the Outstanding Leaders Program a core leadership program. All representatives of The Synergy Group, have been integral in the success of the program, providing professional advice and services as required. Notwithstanding, they are open to feedback and make adjustments accordingly.

Representatives of The Synergy Group take part in our end-of-program celebrations strengthening the relationship between participants and the facilitator. From my perspective this shows Synergy's commitment to a successful program even after the program has been completed.

In terms of logistics The Synergy Group, utilising its Learning Extranet, has a very simple, yet effective, way of delivering materials and ensuring all administrative tasks are completed with ease.

I would thoroughly recommend The Synergy Group's services to all potential organisations looking for professional services and for a true business partner to achieve their goals".

Participant Reaction

"I usually expect to come out of those programs with 2-3 tools to do things better. This first session has given me a dozen. Awesome!"

"The workshop exceeded my expectations, it's a valuable investment in us"

If you would like to learn more about Synergy's Leadership Transformation Program™, Please call or email The Synergy Group and speak to a consultant.

Telephone: 61-2-9238-6633 or **E-mail:** info@thesynergygroup.com.au