

## **Business, Brand, & HR Strategy Aligned By Executive Coaching Transform A Financial Services Firm**

How Practical, Focused, Advice  
Based On Deep Strategic Expertise  
Started A Growing Global Brand!

### ***The Situation:***

- A new Chairman
- Decades of cost-cutting
- A portfolio of dozens of acquired brands
- A need to break out of a regional image and footprint
- A desire to stay independent

### ***The Challenge:***

- Work with the Chairman to rapidly implement his growth strategy
- Engage the senior leaders in execution
- Focus employees across businesses on delivering the new brand to each and every client
- Invest in growth businesses without diminishing the performance of mature businesses
- Drive revenue - fast and inexpensively

### ***The Solution:***

- Engage the top forty leaders through one-on-one coaching
  - Focus first on their real life personal and business challenges and objectives
  - Help them achieve early successes
- Use client data to define and build commitment to the umbrella brand and its economic value
- Implement leader led learning & communication for all 30,000 employees
  - Focus each employee on what must be done to build client loyalty and sustained profitable growth
  - Drive real work and accountability
  - Learn & communicate in the workplace – not the classroom

### ***The Results:***

- Committed engaged leaders
- A global brand driving a well managed portfolio of businesses
- The financial impact of acquiring a \$450M business with an 18% ROE