

## Ensuring Successful Reorganization in Financial Services

### The Challenge

A large financial services company decided to combine 3 subsidiaries into 1 company and had concerns about the impact on employees and on the business.

As a way to enhance long-term competitiveness and profitability, one of the world's largest financial services companies decided to combine three of its subsidiary organizations into a single company.

The decision called for the integration of key processes, systems, and technology across the three subsidiaries over a period of 12 to 18 months. The leaders of the company quickly grew concerned about the impact this change would have on employees. Nearly every employee, they reasoned, would likely experience a mild degree of uncertainty regarding the future—and those employees in the areas most significantly impacted by the integration would potentially feel higher degrees of ambiguity and concern (if not fear). All of this endangered not only the strategic integration, but also morale, performance, and productivity within the entire enterprise.

### Linkage Solution

Linkage developed and delivered customized ½-day programs to managers and employees and a Train-The-Trainer program.

The company enlisted Linkage consultants to help develop and implement a change management initiative that would provide employees with the skills, knowledge, and tools to assist them with the transition process and regain productivity in the organization more quickly. Specifically, Linkage:

- Designed and facilitated nationwide, **half-day manager and employee sessions** to help individuals understand the process they would be going through—and to develop action plans that would enhance their ability to successfully grow and remain productive through this time of significant change
- Delivered a customized 4-day **Leading Organizational Transition Train-The-Trainer** program on-site for approximately 20 internal trainers to provide them with a framework and tools to help people deal successfully with organizational change—and to provide the organization with the internal capability for ongoing, long-term change management
- Conducted **half-day facilitator certification session** that emphasized key facilitation skills and applications to further enhance the effectiveness of these internal trainers





## Results

**As a result of these transition programs and overall strategic change initiative, the company has:**

- Helped ensure the success of the strategic integration of the three subsidiaries
- Created a context for the current initiatives designed to support the translation of values into measurable behaviors around the company
- Implemented a model for balancing small, local interventions with large scale, consistent messaging around change
- Developed strong facilitation skills in its HR/OD leadership team—as well as gameplan for powerfully deploying those skills
- Created an integrated and lasting approach to managing complex change within the enterprise

## Linkage Products and Services used in this Case Study

### **Leading Organization Transition Train-The-Trainer Program**

Linkage, in exclusive partnership with William Bridges & Associates, offers this highly acclaimed program to train internal trainers to lead individuals through strategic change initiatives. Trainers learn to deliver two skill-building workshops: one teaching leaders to lead others through change; and one to help individuals effectively handle change.

### **Linkage Customized Consulting Services**

Linkage developed 2 half-day programs for this client and customized the Leading Organizational Transition Train-The-Trainer program. Linkage has more than 20 years of experience delivering programs delivered on-site in your organization and customized to your needs.

**For more information on our Customized Consulting Services contact us at 781.402.5555.**