



ALIGNING LEADERSHIP AT A MIDWEST BANK



INTRODUCTION

A Midwest bank, managing \$500 million to \$1.5 billion in assets, aspired to unify its regional leaders and develop a comprehensive strategy. The lack of a cohesive approach prompted a new plan for achieving alignment and creating measurable objectives across all branches to ensure collective success



THE STORY

This prominent Midwest bank caters to the needs of a wide range of clients including farmers, families, and businesses. Its offerings merge the broad solutions typical of major banks with the nuanced, client-focused decision-making representative of hometown banking. Diligently working to be the financial services provider of choice, this Midwest bank nurtures growth and prosperity within the communities it proudly serves.



THE CHALLENGE

Leadership initially desired a strategy that included viewpoints from each regional president, but they faced a fragmented approach. The bank later engaged **Bâton Global (B|G)** to develop an enterprise strategy, unit-level strategies, and balanced scorecards for over 50 staff members across various regions.



THE CHOICE

B|G facilitated workshops, interviews, and analyses to identify challenges, shape strategies, and ensure widespread understanding and implementation. This collaborative effort resulted in a unified and articulated strategy that empowered regional branches and reinforced the bank's role in supporting financial stability across the community.

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Bâton Global partnered with a Midwest bank that aimed to unify its regional presidents and develop a comprehensive strategy. Initially lacking a cohesive approach, the bank aspired to achieve alignment and create measurable objectives across all regions to ensure collective success. **B|G** facilitated the creation and implementation of an enterprise strategy in addition to a balanced scorecard approach that filtered down to over 50 staff members.

The Insight phase consisted of interviews and workshops with relevant stakeholders, regional presidents, and the home office, with the ultimate objective of identifying challenges, opportunities, and influential factors. Utilizing PESTLE and SWOT analyses, **B|G** gained a thorough understanding of internal and external forces shaping the bank.

Collaborating to develop an overarching organizational strategy, **B|G** and the bank's leadership facilitated workshops that included executives, board members, and branch presidents. These workshops assisted in the strategy's continuous refinement, alongside the customization into unit-level scorecards for each region that considered individual autonomy and distinct challenges.

During the Innovation phase, **B|G** ensured widespread understanding and implementation of the strategy by conducting communication sessions and establishing data collection systems. A comprehensive guide was composed, ensuring clarity in the strategic planning process throughout the organization.

This collective effort resulted in a unified and articulated strategy aligning with the bank's vision. Fostering trust among regional branches, this approach also empowered them to pursue critical initiatives to reinforce the bank's role as a financial cornerstone in the communities they serve.

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*Working with many organizations, **Bâton Global** has raised the bar on what to expect from consulting firms.*

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HELP YOU DESIGN A STRATEGY
THAT ACHIEVES YOUR GOALS.



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