

### **CREATING A CULTURE OF ENGAGEMENT**



#### INTRODUCTION

A Fortune 500 financial services company aimed to unify the enterprise for growth and efficiency after a leadership transition.



#### THE STORY

This financial services firm in the heart of the Midwest is committed to delivering financial dignity to its clients. Guided by its principles of excellence, it is dedicated to fostering opportunity and innovation to meet the ever-changing needs and goals of retirement.



#### THE CHALLENGE

New leadership sought comprehensive strategies for the entire enterprise and individual departments. They aimed to instill a transformational leadership culture while enhancing operational efficiency and revenue growth.



#### THE CHOICE

Partnering with Bâton Global (B|G), the firm engaged in identifying challenges and industry influences. They collaboratively formulated high-level enterprise and department strategies, resulting in a refined strategic management system. This initiative fostered a transformative culture and steered the firm towards its goals by introducing client-centric offerings and replacing core systems that enable routine strategy tracking.



## bâton global



# CREATING A CULTURE OF ENGAGEMENT

A Fortune 500 financial services firm underwent a leadership transition that motivated the entire organization to modify its practices to encourage revenue growth and operational efficiency. Assisting in this transition, Bâton Global (B|G) partnered closely with the company's new leadership. The focus was to create and align comprehensive enterprise-wide and individual departmental strategies, culminating in the implementation of a robust monitoring system to track progress and update these strategies.

The collaboration between B|G and the financial firm produced transformative outcomes that enhanced operational efficiency and instilled a culture of transformational leadership across the company. The initial phase aimed to establish a collective understanding of the current organizational landscape and discern the prominent industry factors impacting the firm. B|G conducted in-depth interviews with the entire executive leadership team and department heads to identify critical challenges. This stage resulted in a SWOT analysis and ranking of influential PESTLE factors.

Utilizing these insights, B|G and the organization proceeded to develop a high-level enterprise strategy that set forth the vision, values, and overarching priorities. This strategic blueprint consisted of an enterprise-wide balanced scorecard that measured progress and corresponding unit-level strategies in alignment with overarching organizational goals.

The implementation phase included multiple employee information sessions, strategy presentations, and a collaborative scoring exercise to pitch and refine strategies among peers.

The ensuing strategic management system greatly impacted the organization. It facilitated a shared understanding of the enterprise's direction among all employees, which fostered a culture of transformative leadership that could attract top talent and promote innovation. The strategies led to new client-centric product offerings and effectively steered the company towards its vision by replacing core management systems with more efficient ones and employing technology for routine strategy monitoring.



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.



