

Optimising the Induction Experience of Senior Wealth Managers



CHALLENGE

A large Wealth & Investment Management bank recruits experienced Private Bankers into its Wealth Division on an ongoing basis. Looking to improve their induction experience; they sought a trusted partner to provide a high quality programme that developed relationship management, sales capability and technical knowledge, whilst embedding organisation's corporate values, ethical culture and expectations of professionalism and best practice.



SOLUTION

Bigrock worked with the bank to re-design their six week induction programme to reflect consultative sales and relationship management best practice. The programme, which we continue to deliver in partnership with their internal team, provides delegates with a set framework for managing client relationships. It instils the organisation's core values as a basis for the organisation's cultural and behavioural expectations. On completion of the programme, Bigrock assesses delegates' skills and competence levels, ensuring a consistent standard via a meticulous accreditation and sign off process. The Bigrock team continues to deliver this programme, as required, on an ongoing basis.



RESULTS

The success of the induction programme has led to a long term collaboration with the large Wealth & Investment Management bank. The partnership has seen us work across jurisdictions to roll out their Client Advisory Framework globally, whilst embedding leadership capability, relationship management skills and sales excellence in a number of divisions. We have also embedded our training within their graduate and future banker training programmes.



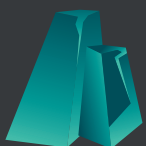
FEEDBACK

The bank's new Private Bankers who attended the Induction Programme commented:

"An absolutely fantastic course. Very well led, with a very high degree of class participation. Greatly recommended for future bankers!" - Private Banker

"Very worthwhile, professionally run and a great introduction to the bank." - Private Banker

"The combination of educational sessions and practical exercises is brilliant and kept us all involved and entertained... facilitator has been first class - not only is he engaging, his experience and guidance helped me enormously." - Private Banker



bigrock

People Performance Solutions

T: +44 (0) 1280 820 780
E: enquiries@bigrockhq.com
W: www.bigrockhq.com