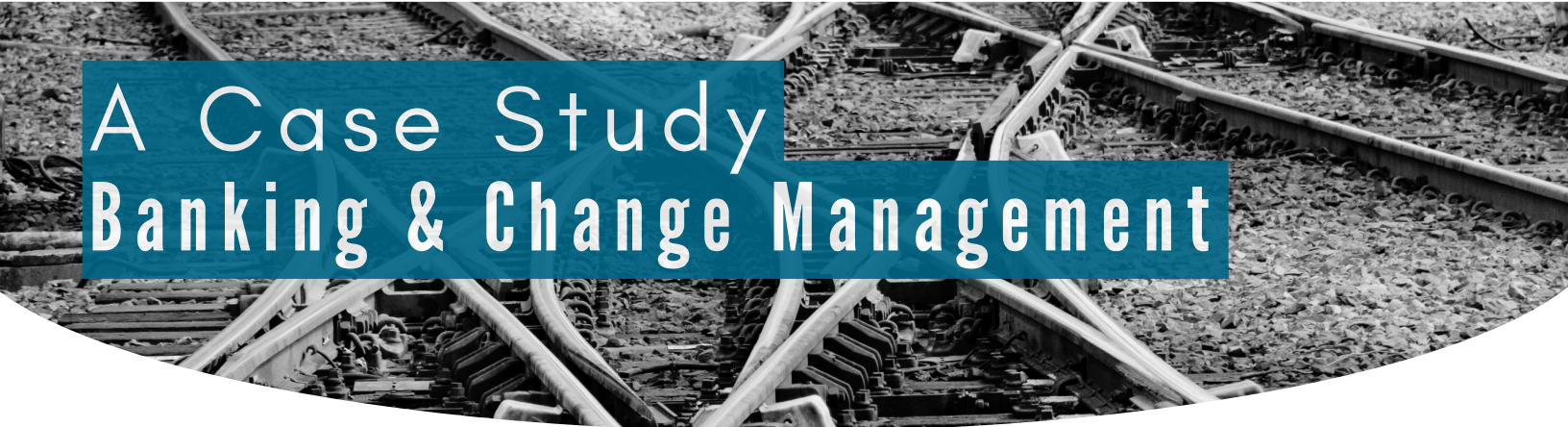




# A Case Study Banking & Change Management

## Financial Institution Invests in Workforce's Change Skills for Long-Term Growth

When a successful bank in the region needed help training employees and executives about how to manage change effectively in their organization, they partnered with Slingshot25. Over the course of three months, Slingshot25 trained a core group of employees to become front-line change practitioners and helped the executive leadership understand more about their role in supporting changes from the top down. The approach not only achieved the goals but also prepared the company for the biggest acquisition in company history just a few months later.

### *The Challenge*

A regional bank was growing quickly. And while the balance sheet looked positive, the pace of growth was taking its toll on employees and clients. Customer complaints were increasing, and employees in the organization were overwhelmed and confused with the ongoing changes that were implemented.

The company needed a partner to help them train employees and executives about the change experience, the fundamental principles of change management and provide simple tools that could be incorporated immediately in support of future changes. This was a large-scale effort that needed to see results fast.

### *Our Solution*

After a thorough needs assessment with their leadership, Slingshot25 developed a change management education and skill development program designed to help the organization get better at leading and managing change. Our approach was two-pronged:

#### **Executive Leadership Change Series**

A series of four one-hour sessions focused on establishing the value, purpose, and a common language across a leadership team first to ensure long-term success. Providing key strategies for active and visible sponsorship and ongoing support of building a change management competency in an organization were key areas of emphasis.

#### **Change Practitioner Training and Labs**

The company identified a group of 25 individuals who were on the front lines of change implementation. From project managers to IT, these individuals participated in a series of four two-hour change sessions with the goal of becoming "change practitioners" for the company moving forward. These classes were designed to skill up this group and build internal capability.

"Lab" sessions were also offered so employees could work on real change projects together with the support of a Slingshot25 change expert to answer questions and provide guidance along the way. These sessions were highly effective in helping employees apply new skills to real work.

## The Results

The company started applying the principles and the tools immediately to change projects. The Slingshot25 system became required for the organization, from project managers to leaders. Doing so gave everyone involved a common language and simple tools (without complex spreadsheets and charts) that aligned to the change process.

The tools were also incorporated into the business' M&A playbook and were relied on for the company's biggest acquisition in company history. Contrary to past acquisitions, the team noticed a significant decrease in issues and client impacts, which were attributed to Slingshot25's training and tools by the executive leaders.

*"Slingshot25's Navigating Change Masterclass makes complex concepts easy to understand. Courtney's depth of knowledge and experience in change management is impressive. Even those on our team who were change certified in other programs said this series was fantastic," said the client. "We were amazed at how quickly our team latched on to the training. Our rollouts have been so much smoother ever since."*

## Ready to Work with us?

When common language, models, and tools are used consistently across an organization, team members gain the ability to communicate effectively. They are able to work more quickly through issues, anticipating pitfalls and working through them in more aligned ways.

Courtney Smock, change management expert and leadership coach at Slingshot25, has worked in corporations for more than 25 years. She's seen it all and managed every kind of change you could encounter: acquisitions, integrations, implementations – all of the "tions."

Our team of experts is ready to support your team in any number of ways – training, workshops, presentations, coaching, and communications support. Contact us today for more information about how we can support your company. **Visit our website at [Slingshot25.com](https://Slingshot25.com) or email [Courtney@Slingshot25.com](mailto:Courtney@Slingshot25.com).**

## About Slingshot25

At Slingshot25, we obsess about what it feels like to work in an organization. We've worked in organizational performance roles for large, complex companies for over 25 years. In that time, we experienced the good and bad of what organizations tee up.

Believing something better is possible, we never gave up. We stayed on the front lines, trying several approaches to make the workplace better for people. Some of our ideas worked. And when they didn't, we learned and continued to refine our approach.

Now, our mission is to share our experience with you.