



# Coaching Redefined

Prepared by Andrew Ourique

# Agenda

What this report covers

---



03 Introduction

07 Pilot

04 Approach

09 Launch

05 Planning

# Case Study: Coaching Redefined



## PROBLEM

Leaders and employees across the Retail salesforce have reported decreased engagement associated with the coaching process and, as a result, coaching related activities are occurring less often across the network.



## CONTEXT

- The Retail banking salesforce includes Financial Planners, Mortgage Specialists and Personal Banking personnel
- The population is across Canada and includes 10,000 employees and leaders
- A new Digital Coaching Tool was introduced 18 months prior to the launch of this project requiring managers and employees to input detailed accounts of their coaching conversations for tracking purposes.
- At the same time as the Coaching Tool was introduced, a new, rigid coaching framework was also introduced dictating what leaders were expected to do on a daily and weekly basis in regards to coaching activities.



## IMPACTS

- Employee engagement
- Customer loyalty
- Revenue

# Approach



## Planning

### Stage 1

During planning, our goal is to understand the group being affected by the change. We do this through data collection, including surveys, focus groups and interviews.

## Pilot

### Stage 2

Once data has been collected and assessed. A proposed plan to address gaps in key enablers and resistance is developed, including communication strategy and training programs, and tested in market. At this stage, iteration is encouraged and reporting is essential.

## Launch

### Stage 3

Once pilot findings align with expected outcomes, the national launch change strategy is finalized and launched. At this stage, maintaining feedback loops to impacted groups and reporting is crucial to manage sustainment effectively and intervene timely, if necessary.

# Planning



## Determine Key Stakeholders

First, we identified representatives across HQ to support our initiative, including HR, Performance Management, Learning, Process, Technology and select teams supporting our impacted groups, including Financial Planners, Specialized Sales and Divisional Offices.

## Data Collection

We began collecting performance and coaching data from across the Retail Banking salesforce and worked with our HR partners to gather external performance management data to understand key trends in the industry. We also ran an internal survey (IdeaExchange) to understand how impacted groups are perceiving the coaching experience in current state.

## Brainstorm Session

We selected key members from impacted groups, including Mortgage Specialists, Financial Planners and Branch employees and their leaders, along with members of the Project Team to participate in a two day brainstorming session to establish guiding principles for the change, uncover key resistance points, gaps and preferred change and communication approaches. Participants received a pre-reading package with insights from the Data Collection phase.

# Hypothesis

We used insights from the Brainstorming Sessions to develop a hypothesis that would promote increased engagement associated with coaching across the network.

---

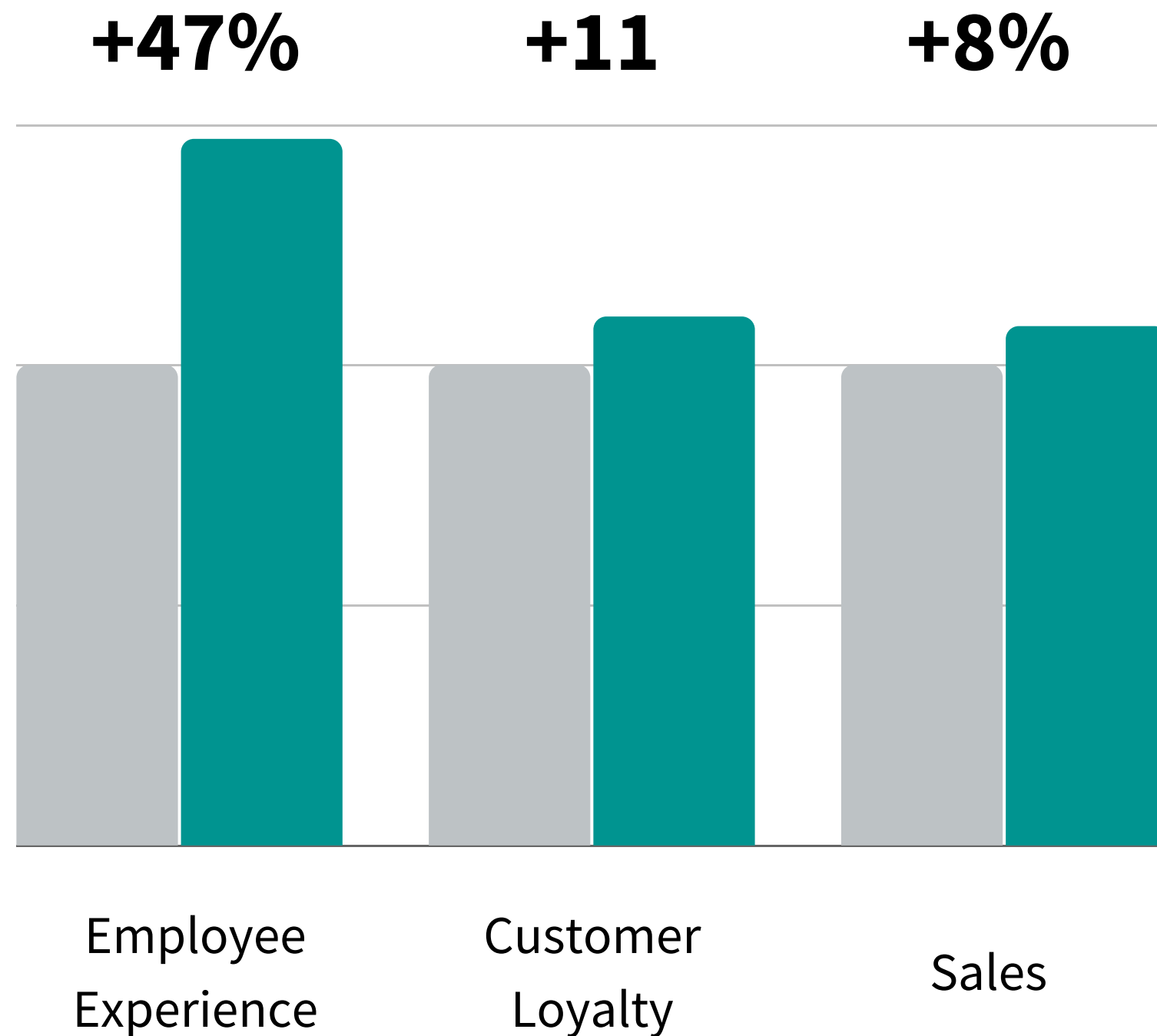
## Next steps

Now that we had our dependent variables, simplification and discretion, we developed several test groups to identify the ideal levels of each to optimize engagement, loyalty and performance.

"If we establish a simplified coaching framework and give our leaders the discretion to determine the type and frequency of coaching activities we would observe increased performance across all key business metrics (employee engagement, customer loyalty and sales revenue)"

# Pilot

Phase 1 & 2



## What did we do?

- We set up seven active pilot groups, testing different frameworks, training programs and tools.
- Our pilot was split in two phases over a 9 month period. The second phase was used to refine our approach based on learnings from the first phase and see if results could be replicated.
- The change management plan, including training and communication, was also piloted during both phases of the pilot.

# What Changed?



## Framework

The coaching framework was simplified from a 17-page document to 6-pages including only 3 distinct activity types (observations, performance and development conversations). Leaders were given discretion to determine the type and frequency of coaching activities with their employees.



## Training

The changes to the framework involved an update to the current Leadership Development Program curriculum for new leaders and a refresher needed to be developed and delivered to all existing leaders



## Coaching Tool

The digital coaching tool was to be decommissioned as we found zero correlation between usage and performance throughout the pilot.

# Launch



## Change Story

We are committed to listening to our employees to promote best in class employee engagement. We are a true believer that improving employee experience is the best way to improve customer loyalty and results in a sustainable way.

In the Spring, we asked you whether the current coaching framework is helping or hindering your ability to coach your employees effectively and we heard loud and clear that there was opportunities for improvement.

Over the last several months we have been piloting a new design of the coaching framework that was codesigned with our frontline teams, one that is more simplified and provides leaders with the discretion to customize their coaching plans to the needs of their employees.

The pilot was a huge success and we are excited to announce that these changes will be launching this Fall at our Annual Fall Conference.

We are not at end of job yet and we want to still hear from you!

# Change Plan



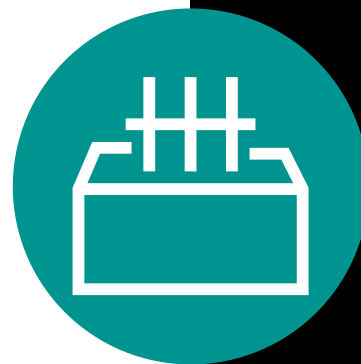
## Prepare

Our first phase involved the communication of changes to key support groups, including Divisional Office, HR and other partners to ensure they knew what was changing and how they could support their groups pre and post launch. This phase concluded with enterprise messaging to leaders with support material and next steps, followed by an employee wide communication.



## Introduce

The next phase involved the introduction of the changes through updates to existing training programs, intranet site content and training sessions with leaders across the network.



## Reinforce

In this final phase, post launch, we worked with partners to embed changes to the coaching framework in related activities. We also ensured that feedback loops with leaders were maintained post launch and performance across the network was continually monitored to assess whether pilot results were being replicated nationally.

# Launch Plan



## September

### Enterprise messaging

Send out communications to impacted groups outlining what's changing and next steps.

## November

### Launch change

Attend Annual Fall Conference to launch changes across Retail Banking

## August

### Prepare support teams

Attend Divisional Office Conference, SSPM and SSOE Forums and HRBP Conference.

## October

### Introduce enablers

Update Performance Management site, send out leadership and employee communication including guides, job aids and training schedule, if applicable.

## On-going

### Reinforce changes

Send surveys and introduce centralized inbox to field questions related to the change and monitor performance. Integrate changes into run state programs and embed new framework and learning across enterprise.