



## Case Study: **Bringing a Fresh Perspective to Performance Management**

Client: **Global Insurance & Banking Group**

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### The situation

With over 140,000 staff in 100 countries this diverse insurance group with multiple operating entities wanted to introduce one performance management system to unite the whole organisation. The IT system to enable this process had been identified, but how to get everyone around the table to agree to the new design was quite another situation.

### The task

*“Focusing on key goals is a big challenge. We have shifting sands through the year, complex teams and no way of properly tracking performance to results” HR Divisional Manager*

Agents2Change were brought in to facilitate the implementation process and ensure the important conversations from Board Level through to Group Leadership happened. With a history of gerrymandering and poor group-wide policy uptake the group needed a full take up to make the investment in the new system worthwhile and provide the much needed reporting across divisions and regions..

### The Process

#### *Reviewing What Work's Now*

Many organisations are in danger of throwing the baby out with the bathwater and this was not what was needed. There was some very good practice and some strong competency and performance ratings process. We needed to pick some of the best examples and bring this to the Group Leadership's attention. Taking the best bits out of each one allowed for a cohesive design to be developed.

#### *Flexible Framework with Clear Design Principles*

The group had a diverse set of roles that had to be encompassed into the same system—from call centre advisers to major fund managers. Therefore it was important to agree some key design principles that were mandated across the whole group—such as a 5 point rating scale, but leave other areas such as the competency descriptors and behavior indicators to local discretion. Providing guidelines and training helped regional HR managers to implement a system with a more appropriate local flavour.

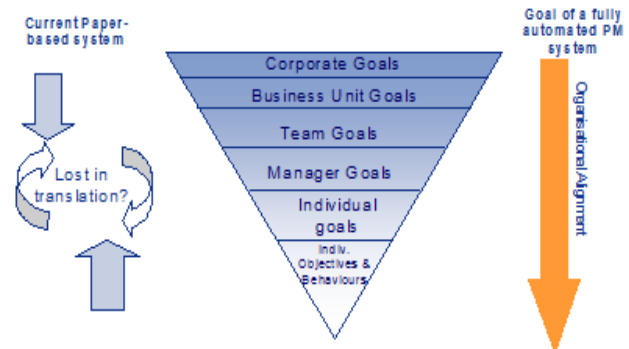
#### *Ensuring Strong Leadership & Sponsorship*

Like any high profile project, this one would live or die by the quality of sponsorship. Historically this was not a strong point for the group, so much effort was investing in getting the steering committee set up, with a very focused decision-making approach, well documented processes and extensive communication of decisions across the group. This brought transparency and accountability to the process and helped regional managers in their implementation efforts.

#### *Training & Communication*

Considerable investment was made in developing the 'core story' of the changes to performance management. What were the key imperatives

#### Achieving alignment:



### The Results

- Automated PM process able to deliver 50% improvement in management time for appraisals
- Performance tracking processes implemented and improved reporting
- Successfully implemented the first group-wide system

*“Agents2Change’s key strengths are meticulous attention to detail and in-depth knowledge of the subject matter. They identified ‘quick wins’ and proffered pragmatic solutions, always aimed at the support of our business strategy in mind” Global Head of Performance Management*

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