

Global Financial Services Firm Transforms Strategy Execution Processes with the Achieve System™

CLIENT INFORMATION

- Multinational Financial Services Firm
- 250,000+ Employees

“The Achieve System provided us with the tools, framework, and shared language for independent problem-solving that enabled us to cultivate an innovative mindset.”

The Challenge: Unclear Communication and Competing Priorities Threaten Leadership’s Ability to Execute Critical Initiatives.

Hampered by a fragmented, chaotic process and confusion over roles and accountability, one thing became abundantly clear to the CFO of this multinational financial services firm: they needed to optimize their strategy execution procedures. Unclear responsibilities, competing priorities, and an influx of tasks and information from too many directions left the team struggling to effectively communicate mission-critical data and make strategic decisions. According to the CFO, “We were repeating the definition of insanity — doing the same thing over and over and expecting a different outcome.”

The Application: Prioritize Key Objectives and Enhance Efficiency with the Achieve System.

Achieve Performance Experts helped the leadership team prioritize and align on their most critical initiatives and challenges using the *Air, Water, Food* techniques. They determined that their top priorities were providing data-driven insights to the firm’s most senior leaders, improving team culture and collaboration, and serving the firm as a whole more efficiently. Over the course of a year, they worked with the Achieve delivery team to address each of these key priorities. They refined and standardized their communication and data reporting processes for seamless insight-sharing, defined a mission and vision that united the team to a shared purpose, and introduced new systems to streamline their workflow and create their ideal future state.

The Results: A Transformation in Efficiency, Collaboration, and Strategy Execution.

The newly optimized workflow minimized duplicative work, upgraded manual processes to automation, clarified roles and responsibilities, established a system for task prioritization, and led to an overall increase in efficiency. Leaders report that the standardization of internal communication has led to better strategic decisions. This process introduced a higher level of seamless teamwork alongside a strong commitment to transparent communication, which earned positive feedback from both executive leaders and the team members themselves. The team shows higher engagement and empowerment, and employee survey results show significant improvement in every category.



Enhanced Productivity & Streamlined Efficiency



Improved Teamwork & Communication



Shared Direction & Increased Innovation for Optimized Results



Employee Survey Results Improved in Every Category Year-Over-Year