

## Executive leadership and strategic development. We delivered.

Our leadership development and executive coaching program enabled a \$100M financial services firm to establish its vision and long-term strategy.



The recent financial collapse not only impacted the economy, it changed the way financial services firms do business. One of the nation's largest privately-held brokerage firms partnered with us to identify its vision, commit to process-driven decision making and outline a long-term strategy.

### The Challenge

The financial services industry is one of the most tightly regulated sectors today. With the recent recession fresh on their minds, and because of federal regulations, one of the top privately-held independent brokerage firms in the United States began to stagnate. Though staffed with some of the best brokers and financial services executives in the nation, decision-making was slower than necessary, most managers were risk-averse, employees were unclear on priorities, and leaders lacked the vision to properly communicate the organization's vision and most pressing challenges.

### The Process

After analyzing the organization's structure, processes and leadership we were able to determine that the corporate strategy was loosely defined and senior leadership was not in agreement on organizational priorities. The organization – as a whole – lacked a cohesive, working strategy, so managers had difficulty determining the best course of action.

Before we could begin implementing any process improvements or leadership development, we worked closely with the senior leadership team to determine a vision and to identify priorities.

We worked with senior leaders both one-on-one and in group sessions, to ensure a shared vision and concerted efforts to achieving common goals.

### The Solution

We worked closely with the firm's senior leadership team to clearly define a vision. We then developed processes with the goal of developing a short-term proxy for a better, more long-term strategy.

Our work with the firm's HR executive was key to the overall success of the program. Through assessments and individual coaching, we worked with the HR executive to develop a solid grasp of business issues and the HR levers that impact them. We also worked together to establish a longer term strategy for the organization's structure, current challenges and anticipated challenges.

### The Results

In a short period of time, the firm's senior leadership team was able to better understand their role in impacting the direction of the organization. We were able to identify senior-level staffing needs that were important to paving the way for future growth and changes.

Senior leaders were able to establish priorities, effectively delegate tasks, communicate the firm's vision to employees, and laser focus on the firm's long-term strategy.

You can learn more about us at: [www.triangleperformance.com](http://www.triangleperformance.com).



Sector: Insurance/Financial Services

Solution: Strategic Development

Challenge: Risk-averse leaders, lack of clearly defined vision and priorities.

Results: Established clear vision, garnered employee buy-in, designed a long-term strategy that reflected the firm's vision.

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