

Creating high-impact development sessions for financial and legal professionals

A financial services organization shifted its approach toward short, memorable training sessions instead of day-long events – and it's been a huge success. What's the secret?

As a company that prides itself on being recognized as one of Britain's top employers, the Phoenix Group is constantly striving to provide high quality development to its financial accountants, actuaries and legal professionals. The company outsources its administration and support functions, meaning that the working environment has a strong emphasis on professional services, and the workforce has completed many professional exams and qualifications.

In this context, Learning and Development Business Partner Tamar Hughes reiterates the importance of delivering hard-hitting, immediately applicable development that staff can put into practice as soon as they get back to their desks. The business was moving away from day-long management training sessions towards short, memorable HITS – high-impact training sessions – for leaders.

Hughes and the team also faced the challenge of really selling the benefits of interpersonal skills to the workforce, establishing the value of what she refuses to call “soft skills” – instead calling them “the really hard skills”. Being able to communicate well and persuade others of your position are skills that are extremely difficult to acquire, she argues – but the L&D team has seen staff reap huge benefits from adding these skills to their toolkit.

Business Challenges

- Leadership, management and team development
- Communication skills
- Upskilling technical specialists with interpersonal skills
- Coaching internal L&D team
- Less time available for training

Company Profile

Insurance service provider Phoenix Group is a closed life assurance fund consolidator specializing in the management and acquisition of closed life and pension funds. It has over 5.6 million policy holders and assets worth £74 billion and is the largest UK consolidator of closed life assurance funds. Phoenix is also recognized as one of Britain's top employers by the Top Employers Institute.

Phoenix Group

Solution

As a qualified MBTI practitioner, Hughes was aware of the great personal insights the tool could bring and wanted to build on the limited MBTI knowledge already in the business in a way that fitted with the program of HITS that was being designed. To do this, she brought in our consultancy team. Hughes says of the collaboration: "I knew they were the MBTI specialists, but they also had a great reputation for designing the kind of bite-size, high-impact development sessions we were after. We needed a consultant who could design a series of workshops tailored to our needs, and who could then pass on their knowledge and expertise to our internal L&D team so that we could run the sessions ourselves."

Our consultants worked closely with Hughes and the team to find out exactly what they wanted Phoenix staff to get from the HITS. This was achieved with a series of meetings, which identified where Phoenix wanted to be. After this, we brought ideas, structures and facilitator guides to the table. The process was one of constant refinement, during which Hughes built up an exceptional working relationship with our lead consultant, who provided a role model for the coaching relationship by giving constant advice and examples that resonated with the team. She kept the ideas alive in team members' minds, so they were then equipped to do the same with their workshop participants. She elaborates: "The process was incredibly rewarding. So often you are offered a partnership solution, but really, it's just a standard offering. The consultant wasn't only a designer, trainer or facilitator – she mentored us, and an unexpected side-benefit of this was that we got some team development from it ourselves. She was flexible, despite all the things we threw at her! It was a really productive relationship, and we felt she had become a member of our team."

The outcome was a program of six MBTI and TKI-based HITS for six to ten people at a time, focusing on conflict, communication, change and decision-making. They each last between 90 and 180 minutes and give participants immediately workable strategies to improve their effectiveness. "We were constantly addressing the 'so what?' factor. The sessions had to move very quickly from the theoretical

Solution

- Short, high-impact MBTI and TKI training
- Focus on immediate practical application of learning

“ The collaboration was really productive – we felt like the consultant had become a member of our team. ”

Tamar Hughes,
Learning and Development
Business Partner, Phoenix

Phoenix Group

interest of the tools to real-life application, especially for time-poor professionals who might be sceptical about this type of session. We couldn't get carried away designing lots of theoretical material – people needed to walk out knowing instantly what they would do differently.” This involved translating the insights from the MBTI and TKI frameworks into tangible plans of action, and getting the language and tone right to appeal to this audience.

Results

Hughes speaks passionately about the advantages of the consultant-designed HITS, both for the immediate L&D team and the wider organization. They have enabled much more productive coaching conversations to happen, as well as being a chance for teams to bond in a genuine sense – to see things they have casually observed about each other played out live via practical exercises. “People keep coming back to talk about the exercises and what they've reflected on as a result,” she explains. “One small example of this is in team meetings, where the extraverts are considering how to enable the introverts to speak and contribute, resulting in more sharing of information and expertise, and ultimately, better, more business-focused decisions.”

Hughes and the team are now delivering a full program of HITS, adapting the content to be relevant to each team – avoiding the ‘sheep dip approach’ and ensuring that the sessions are genuinely meaningful for all taking part. There has been a huge uptake, including some events for high profile individuals in top management positions – people who are often hard to please! “When people start knocking on your door to tell you they've heard great things about the HITS and want to attend one, that's when you know you've got it right!”

This feeling of ebullient enthusiasm for the MBTI ideas and the HITS is infectious – and there's a desire to embed the MBTI framework at all levels in all departments. Over time, the team aims to add to the layers of understanding with further MBTI applications. Hughes concludes: “It's been a wholly positive experience. We learnt so much, and now we're passing on the benefits to the organization. I would highly recommend it.”

Results

- Suite of internally-delivered modules for a range of leadership skills
- Better coaching conversations
- Transformational team development
- Enthusiasm for personal development across the organization



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