



## **Background**

AJ Bell Ltd, a leading financial services company, came to Enthios in 2015 asking us to design and deliver some training modules within a 6-month leadership programme. As one of the largest providers of online investment platforms and stockbroker services, with more than 111,500 clients, their managers all hold busy and demanding roles.

The company's head office is in Manchester with a specialist financial publishing business, AJ Bell Media, in London as well as a stockbroking business in Tunbridge Wells. Having grown from 200 to 600 people in a short space of time, the company is enjoying great success. With this however, comes its own inevitable challenges, such as the speed of change and a fast-paced environment. Managers need to work well under pressure, adapt to new practices quickly and, above all, inspire their teams.

## **The challenge**

MC<sup>3</sup> surveys have been developed by Best Companies as a way to help managers:

- understand what good managerial engagement looks like
- identify which aspects of behaviour they need to work on to become better managers
- encourage their staff to be more engaged

After completing a manager wide MC<sup>3</sup> survey, AJ Bell Ltd identified four key elements and four sub factors which they wished to focus on. These were all 'soft' skills such as motivating, considering, conversing and caring. Within those, the following skills were recognised: supporting, understanding, caring, inspiring, energising, listening and informing. The tendency was often for staff to concentrate on the highly technical aspect of their roles, at the expense sometimes of these softer more 'persuasive' skills.

AJ Bell wanted the training programme to be delivered for sixty leaders in the organisation across all three of their sites in the UK. One further design constraint was the amount of time that these senior managers could be released from their duties.

The programme needed to be integrated with other leadership initiatives within the organisation, including performance management and communications. It also had to be overtly aligned with the company's core values and their declared 'Manager's Promise' for their leaders.

## **What Enthios did**

We designed two half-day workshops which were essentially focused on helping managers develop the skills required for them to deliver AJ Bell's overall strategy. The two workshops were supplemented with Action Learning Sets and also, for a few individuals, some one-to-one coaching.

The first workshop was primarily focused on 'Myself as Leader' and was aimed at enhancing self-awareness and authenticity of leadership style. Emotional Intelligence and its value in building resilience were the core elements, which led to an exploration of understanding individual differences and how to work with them.



The second module was aimed at 'Communicating Persuasively' and extended the concept of individual differences into areas such as motivation and values.

In both workshops, we concentrated on providing leaders with simple pragmatic techniques that could be learned quickly and applied immediately.

Our style at Enthios is quirky yet highly professional. We know from experience that participants are often more receptive to training if it is delivered in a fun way, which actually also results in more long-term impact.

We took care to ensure consistency in the delivery of our training across all the modules, despite being at different times, and took the different personalities of the various managers into account.

Enthios was able to work in all three locations across the different sectors. This had the added advantage that if a member of staff couldn't attend their session in Manchester, they could still take up the training at one of the other locations.

### **The results**

One noticeable impact of the training was that managers started to use their newly-found action learning skills to facilitate their own problem-solving themselves.

Another point of note was that after the senior board members had all attended the training, they declared it should be made mandatory across the organisation - a great endorsement.

### **Future plans**

February 2016 will see the re-run of the MC<sup>3</sup> survey across all the managers and we will review the results 'before' and 'after' to enable us to assess the success of the application of these skills in the workplace.

These 'soft' skills are now going to become one of the key modules of the Managers Development Programme every year, demonstrating that the value of the training has been recognised.

### **What the participants made of it all**

*'Understanding the way that other managers work within AJ Bell has allowed me to make sure that I am living up to the expectations and experiences of team members. The sessions have also given me time away from the usual daily tasks to think carefully and clearly about how I am acting as a manager and in which areas I can improve.'*

*'I think this is a major contributor to being a successful leader and manager - being understanding to people as individuals will help get the best from them.'*

### **And what the client thought**

**AJ Bell's Learning & Development Manager, Louise Parlett**, said, *'I chose to work with Enthios because they understand our vision for the MDP. They quickly identified how best to approach key areas of development for the managers within our organisation. They deliver sessions with authority and charisma and recognise development needs in others even when sometimes they don't!'*