cprime
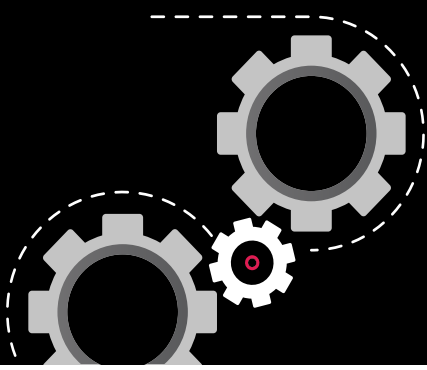
Beyond IT: An International Bank
Empowers Its Marketing Teams with Agile

Case Study
Financial Services Company

Company Details

Industry: Financial Services

Company Size: 220,000 Employees

Location: Headquartered in the UK; Marketing Team in this Case Study located in APAC

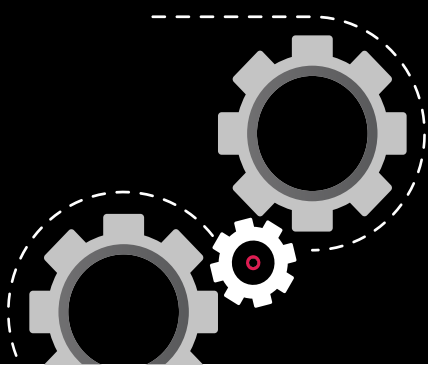**Products:** Commercial and Retail Banking Services

Cprime Services: Agile Transformation and Agile Team Training

The Problem: With regional marketing teams spanning the globe, the bank wanted to improve communications and increase productivity by adopting Agile for its marketing teams. With the help of Cprime Agile experts, they adopted tools and a mindset that promotes cross-functional collaboration over silos and hierarchies.

Overview: A Global Presence

Headquartered in the UK, this Cprime client is a worldwide market leader and its workforce reflects that diversity. With 220,000 employees and operations in over 60 countries, the bank holds over 2.7 trillion USD in assets.

With roots that reach back to 1865, this top-fi e international fina cial institution has major operations based in Hong Kong, Shanghai, Taiwan, the Philippines, Japan, Singapore, Vietnam, and Thailand in addition to Canadian, Mexican, and several South American and European subsidiaries. In 2021, the bank recorded revenues of 18.9 billion USD, up from 8.8 billion in 2020.

The Challenge: Bridging Cultural Differences and Tackling Misconceptions

Driven by an executive sponsor, the bank sought to alleviate pressure and increase effici cy within its international B2B, business, and traditional marketing teams. They also needed a way to focus the teams on providing significant, incremental customer value. And, finall , they needed to focus on driving business outcomes rather than on perfecting individual deliverables within a static plan.

"The teams were overwhelmed and working late to meet goals without making tangible progress," explains Cprime Agile Coach, David Marsh. "They were locked into a mindset where they were dedicating the fi st three to four weeks of a three-month project to planning and writing the brief rather than delivering and getting feedback. Even with intuitive and "fun" Agile tools in place, they were still using paper notebooks to track tasks."

Changing Perceptions

To accomplish its goals, the bank fi st needed to shift the marketing teams' perception that Agile was just for developers. "Early on we found that if we talked about Scrum or anything they felt was software related, they immediately turned off," says Marsh. "They only wanted to know how organizations around the world use Agile to deliver successful marketing campaigns."

Cultural Considerations

The organization's multicultural workforce presented the final hurdle. "It is difficul enough creating change in an organization," says Marsh. "But, in this case, we were dealing with regional Asian cultural differences and formalized hierarchies. The team leaders felt that, especially in Zoom meetings, key stakeholders were often spectators."

To establish collaboration, the bank needed to open communication within teams as well as between them. Looking for a solution, the bank contacted Cprime.

The Solution: Partnering with Cprime to Ensure Success

Cprime fi st adopted a proactive approach to defining the bank's requirements. "We focused on discovery, meeting up with all the APAC heads of marketing to identify their needs and understand their pain points and the challenges they were having," says Marsh.
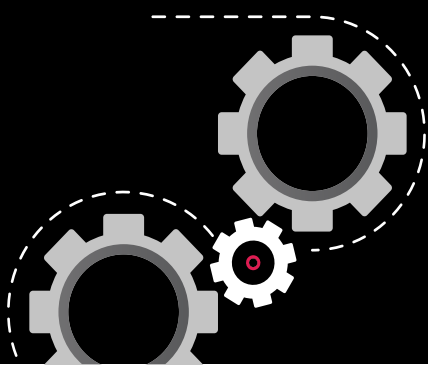
An Agile Foot in the Door

One key Cprime takeaway after discovery was the role that software tooling played in the marketing teams' uptake of Agile ways of working. Where a previous vendor's efforts fell short in their attempt to get the marketing teams to adopt Jira, Cprime identified that the teams had independently gravitated to Monday.com, Agile team management software that is adaptable to ways of working that include Scrum and Kanban.

"Monday helped mitigate the team's aversion to what they considered Agile software development tools," says Marsh. "It is an intuitive, easy to use, and visually engaging tool. It was also a foot in the door to promote Agile concepts and help the marketing teams understand their capacity by breaking their work down, prioritizing, and achieving a more sustainable pace."

Bespoke Training for Specific Needs

Armed with this understanding, the Cprime trainers went back to basics, creating a bespoke program to make Agile concepts relatable to their marketing audience and provide them with a framework they could use alongside the tool to streamline marketing processes. "Everything was customized because it needed to be. We created introductory workshops, drawing on the Agile Marketing Manifesto and Alistair Cockburn's Heart of Agile with its Collaborate, Deliver, Reflect, and Improve cycle," says Marsh. "Cprime delivered, and that resonated with the teams and helped change their approach."

EmPOWERing communication

To improve communication during meetings over Zoom, Marsh and the Cprime coaches again applied proven Agile concepts to fit both the marketing organization's goals and the teams' cultural context. The team adapted the Agile Coaching Institute's POWER Start to establish the purpose and desired outcome of each call, and improved engagement by clearly defining ach participant's role during the workshop or meeting.

Over the course of the engagement, Cprime also developed the Agile Catalyst Network, a series of discussions and workshops that covered multiple topics including team formation and dynamics, backlog estimation, and agile story point estimation techniques. This program doubled in size within a few months and led to several excellent coaching opportunities in various teams. Those opportunities even included the regional B2B marketing strategy and programs team.

> *"Over the course of the training sessions, we saw behavioral changes in the bank's marketing team leaders. Those positive adjustments empowered their team members to speak up and actively participate."*
>
> *- David Marsh, Cprime Agile Coach*
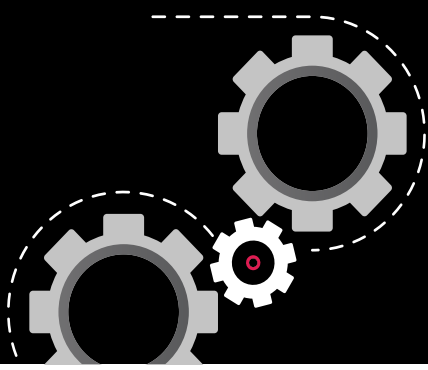
Results: Watching Foundations Take Shape

"There were several teams of around ten people each, and we eventually trained over one-third of the client's 300-person strong Asian marketing force," says Marsh. "We easily covered a dozen different subjects, many of them at the team's request. The customized training approach worked," says Marsh. "Our corporate sponsors reported that many of those catalyst session participants went back to their own leadership to say 'Hey, we explored this, I think we should roll it out to the team.'"

Improving the Workplace

Encouraging the use of Zoom annotations and the POWER Start to define roles and promote objectives during meetings also bore fruit. "The biggest thing that we saw was an improvement in engagement and collaboration during the meetings. All of the teams showed growth, but one team from Vietnam really started opening up," says Marsh. "They learned they had a voice and they could contribute."

In addition to empowering the team members, Cprime worked with the marketing team leaders to assist them with Agile leadership and address the issue of staff retention in light of the Great Attrition. "We did a lot of role-playing and explored common management scenarios," says Marsh. "And the leaders began to realize that a lot of their learned behavior was inhibiting agility.

A Basis for Change

"We laid a strong foundation. They now understand that to continue moving forward, they need to adopt tools and a mindset that promotes cross-functional collaboration over silos and hierarchies."

"We are clearly adding value," concludes Marsh. "The teams started hesitantly with single sessions and now they keep calling us back for more. Our calendars are full despite their heavy workloads and other changes within the organization."

If you'd like to see similar results in your organization, explore our Agile Transformation and Agile Marketing solutions.

Financial Services Company

Featured Team Member

David Marsh
Agile Coach, Cprime

David is a skilled business solution delivery leader, an expert practitioner, coach and instructor of agile culture and engineering practices. He has enabled agile teams to deliver successful solutions throughout various industries in several countries.

About Cprime

Cprime is an industry-leading, full-service global consulting firm with a focus on providing integrated and innovative solutions around digital transformation, product, cloud, and technology. With over 20 years' experience, we provide strategic and technical expertise to businesses across more than 50 industries. Our team of advisors and technical experts have the know-how to meet organizations where they are to develop actionable solutions and solve business challenges. We also collaborate with our expansive network of partners to design, deploy, and harmonize technology stacks across organizations. Our mission is to empower visionary business leaders and teams to reimagine the future of work to achieve better outcomes.