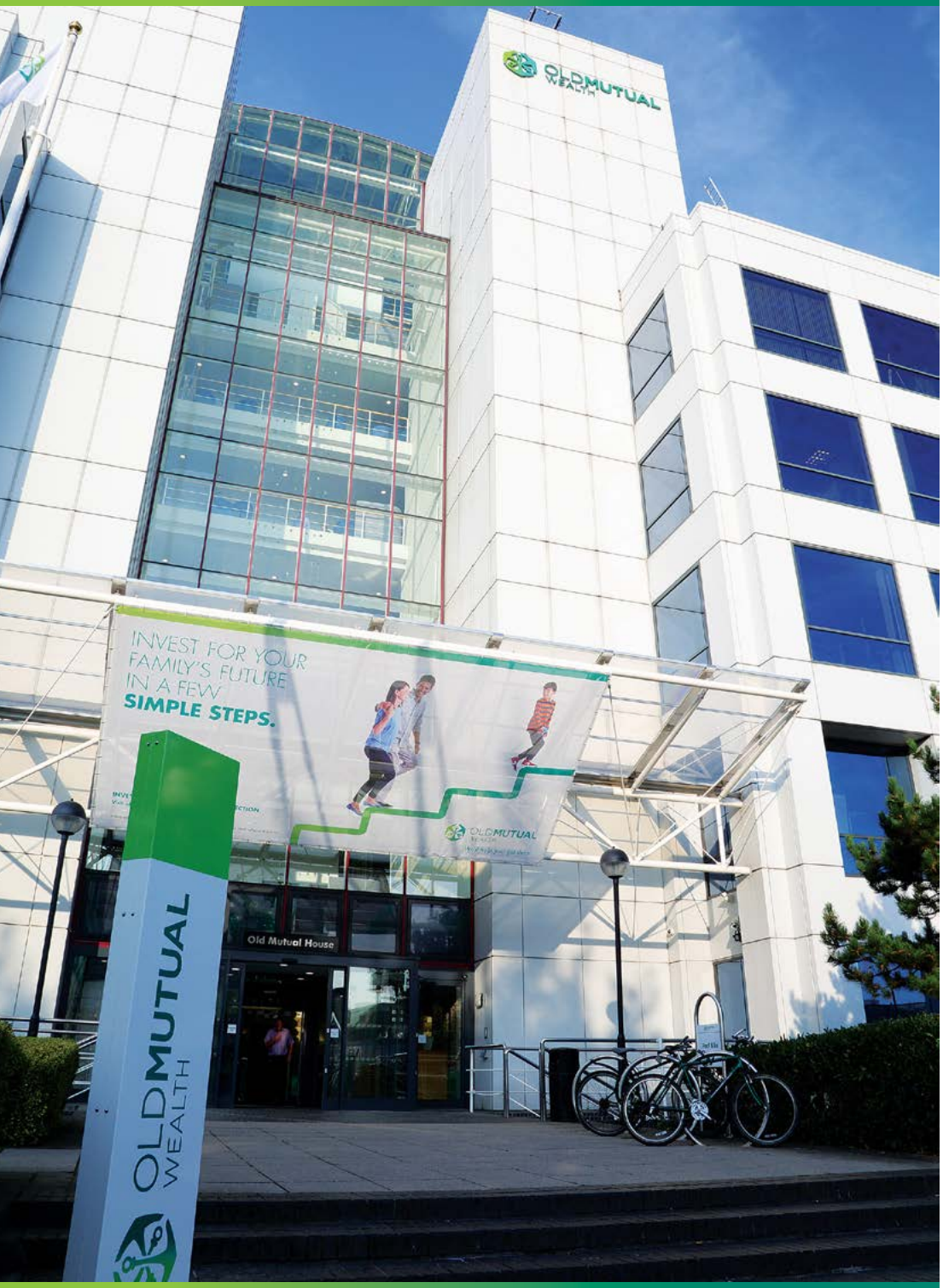


ENABLING POSITIVE FUTURES AT **OLD MUTUAL WEALTH**

ACCELERANCE
LEADERSHIP FOR BUSINESS PERFORMANCE

OLDMUTUAL
WEALTH

ENABLING POSITIVE FUTURES AT
OLD MUTUAL WEALTH

CONTENTS

	PAGE
EXECUTIVE SUMMARY	1
ABOUT THE PARTNERS	3
THE CHALLENGE	4
THE DISCOVERY PROCESS	5
ENABLING POSITIVE FUTURES	7
TIMELINE	9
IMPACT	10
LEADING CHANGE	13
CUSTOMER FOCUS	14
ONE ORGANISATION	15
COHORT SPONSOR PERSPECTIVE	16
PARTICIPANT PERSPECTIVE	17
MANAGED SEPARATION	18
APPENDICES	19
360° FOLLOW-UP SURVEY RESULTS	20
SPONSOR BIOS	21
PROGRAMME DIRECTOR BIOS	29

EXECUTIVE **SUMMARY**

Old Mutual Wealth is here to help create prosperity for the generations of today and tomorrow. That purpose guides everything we do, from creating wealth for customers, to promoting a responsible, customer-focused investment industry, as well as our broader contribution to our employees, the communities in which we operate and to society.

Old Mutual Wealth is a unique full service wealth management business, spanning financial advice, wealth management products, asset management and discretionary investment management.

In 2012, OMW set out to reimagine the Wealth Management Business. The goal was to transform from a standalone investment platform business and closed life company into a next generation wealth manager. This included a large scale disinvestment programme from Continental Europe and a major investment in advice, platforms and asset management in the UK market.

Old Mutual Wealth's ExCo recognised that to bring the component parts together, the company would require more effective leadership from 'those who manage the business on a day to day basis, those who manage the teams at the coalface, who are delivering on our promises, day-in and day-out.' CEO, Paul Feeney, identified three critical capabilities required of frontline leaders. They must

- Understand and deliver the OMW strategy.
- Build relationships across the group to breakdown walls and deliver brilliant customer outcomes.
- Lead people through change.

OMW ran a six-month tender process culminating in the appointment of Accelerance, an organisation with a deep knowledge of financial services and a global footprint in management and leadership development. Working in close partnership, the Accelerance Project Team, Michael Maffucci and Dr. Mark Jenner, and OMW L&D specialist, Nick West, started the process of programme design with a rigorous discovery phase to prioritise the business challenges leaders would encounter in driving Paul Feeney's ambition for OMW.

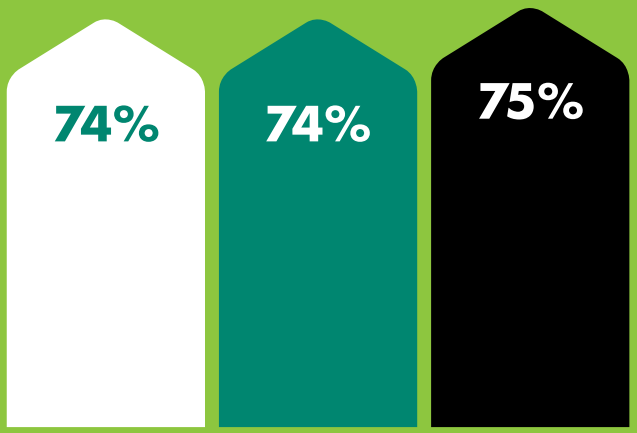
The multi-step discovery consulted senior executives, target participants, their managers, and senior HR representatives, and yielded a deep appreciation of the strategic context and nuances of operating the emerging business model, the business challenges specific to each major business unit, the gaps in leadership effectiveness, and the unresolved issues regarding governance and integration between the individual business units.

The result was 'Enabling Positive Futures' (EPF), a six-month, modular leadership programme for 150 mid-level managers in 'high-impact' roles across all OMW's major business units. EPF focused on facilitating a leadership mindset and embedding the skills and knowledge required to execute the company's strategic transformation across three key areas:

- Bringing to life our 'One Organisation' strategy.
- A true 'Customer / Client Focus'.
- Enabling our people to be 'Changemakers'.

Because the achievement of these three outcomes was crucial to OMW's strategic transformation, impact measurement was built into the programme design from the start. The goal was to identify and measure observable changes in leadership behaviour and leadership confidence in executing the three programme objectives of one organisation, customer focus and changemaker.

THE PROGRAMME'S IMPACT HAS EXCEEDED OMW'S HIGHEST EXPECTATIONS:



of 360° stakeholders indicated that they had seen an improvement in... *'Overall Leadership Effectiveness'*

of 360° stakeholders indicated that they had seen an improvement in... *'Customer First'*

of programme alumni are more effective at aligning the activities of their teams to the execution of the OMW strategy.

AS A RESULT OF ATTENDING
THE PROGRAMME, ALUMNI STATED:

89%

the programme has been valuable to their careers.

89%

they are providing more constructive feedback

90%

they are collaborating more often with peers and colleagues.

66%

are better equipped to manage the leadership challenges they face with Managed Separation.

83%

they had raised the performance level of their teams.

83%

they prioritized understanding client expectations to meet their needs.

It is widely accepted that EPF has played a vital role in OMW's progress towards achieving its strategic goals, its implementation of the Vertically Integrated business model, and in driving overall financial success. In addition, the programme has equipped Old Mutual Wealth for Managed Separation from its parent, Old Mutual Group, by ensuring a sharper Client Focus along the entire value chain, and helping to build a business that enables the prosperity of the generations of today and tomorrow.

Watch EPF Programme Summary Overview

ABOUT THE **PARTNERS**

AN AUTHENTIC PARTNERSHIP – TWO PARTNERS CREATING ONE SOLUTION

Old Mutual Wealth is a leading wealth management business providing financial advice through the Intrinsic network; wealth management products and services through the Old Mutual Wealth UK and Old Mutual International; asset management solutions through Old Mutual Global Investors; and discretionary investment management through Quilter Cheviot. Old Mutual Wealth oversees £123.5bn in customer investments (as of 31 December 2016). OMW's purpose is to help create prosperity for the generations of today and tomorrow.

Accelerance was founded in 2011 on the observation of its CEO, Luca Turconi, that the content-heavy programmes that fill training department calendars don't equip leaders to exercise leadership. So Accelerance partners set out to provide a more meaningful, effective, and impactful way to develop leadership capability. The approach involves working collaboratively with clients to address what is real and urgent in their organisations. Accelerance uses an iterative process that leverages listening, questioning, challenging thinking and assumptions, and co-creating the most suitable, bespoke intervention. With offices in London and Singapore, and a presence in Europe, Asia and the USA, Accelerance consultants combine their corporate experience with pedagogical expertise to build interventions that develop leadership, address organisational challenges and drive business performance.

THE CHALLENGE

The European wealth management sector has been experiencing the 'greatest winds of change that many have seen in a generation.' Eroding customer trust, changing regulatory landscapes, and a volatile and uncertain future have severely tested the business strategies of many wealth managers in Europe and around the globe.

To meet these strategic challenges and prosper in the future, Old Mutual Wealth, under the leadership of CEO Paul Feeney, began a journey in 2013 to create a new breed of wealth management business, dedicated to 'helping to create prosperity for the generations of today and tomorrow.' To enable this ambition OMW would build a full service Wealth Management business grounded in the UK, with peer-leading capabilities in each area to build solutions that deliver better customer outcomes.

OMW began the transformation process with two businesses; Skandia UK and Skandia International. Several Continental European businesses of largely closed life books, that were not core to the strategy were divested over the next three years. In 2012, Old Mutual Wealth created a new asset management business called Old Mutual Global Investors. In July 2014, OMW acquired Intrinsic, a network of Independent Financial Advisors and Quilter Cheviot, a discretionary investment manager was acquired in October 2014,to complement the three remaining business units.

These strategic moves were a bold and significant change in the business portfolio of Old Mutual Wealth. There was a challenge, at the operational level, to ensure there was a deep understanding of the customers each business unit served, the products they sold, and their particular regulatory and compliance environment. This was exacerbated by the absence of a strong network of personal relationships across the five core business units. Paul Feeney and his team knew it would be difficult to fully leverage the business model with these deficits in understanding and relationship. They also realised that the collaboration and cooperation required to execute the strategy would need to be 'jump-started' to meet the commitments the company had made to the market.

Paul Feeney's EPF Welcome Video

To achieve their ambitious plan would require a significant improvement in leadership and relationships across the company – especially at the operational level. Frontline leaders would need to be more comfortable driving change, collaborating across boundaries, and maintaining a relentless focus on the customer.

This was the genesis of the Enabling Positive Futures programme.

THE DISCOVERY **PROCESS**

PHASE 1

Old Mutual Wealth's Learning & Development Team commenced the discovery with a series of senior-level roundtables that surfaced three capabilities needed to achieve the strategic ambition:

- **Bringing to life 'One Organisation'**
  Leaders needed a deeper understanding of the strategy. Although senior Leaders understood the components, the messages diluted as they filtered to the frontline.

- **A true 'Customer Focus'**
  Legacy silos, a history of autonomy, and weak personal relationships created significant barriers to success whenever the company tried to deliver new value to the customer.

- **Enabling people to be 'Changemakers'**
  For many managers, too many processes and legacy 'rules' made it hard to challenge the status quo. Many lacked skills to navigate the inevitable conflicts, which arise it times of change.

These three themes became the foundation of the Enabling Positive Futures programme.

PHASE 2

Accelerance was appointed to design and deliver the Enabling Positive Futures Programme in November 2014 and started the detailed discovery process in December 2014.

The three-month diagnostic process prioritised the programme content and identified the pedagogical techniques that would deliver maximum value to the participants, the people they lead, and to OMW as a whole.

The process involved a dialogue with four stakeholder communities: senior OMW executives, target participants, their managers, and HR Business Partners.

Round 1: Framing the strategic context via conversations with senior OMW executives
During one-to-one meetings, the Accelerance Team explored the emerging strategy, the intricacies of the Vertically Integrated business model, the pros and cons of the legacy cultures, the strengths and weaknesses of the EPF leadership cadre, and a catalogue of concerns and issues, which could impede medium and long-term strategic success.

Round 2: Exploring the target participants' strategic understanding and their leadership roles
Conversations with Business Partners, target participants and their managers provided insight into how well leaders understood the vertically integrated strategy and their role in executing it.

THE DISCOVERY **PROCESS**

PHASE 3

OUTPUT

The output from Rounds 1 and 2 yielded the following set of overarching programme objectives:

Participants would:

- Acquire a deeper understanding of OMW's strategic transformation, how their roles connect to the customer and impact the execution of the strategy - regardless of where they sit in the new organisation.
- Build the leadership mindset and skills necessary to 'operationalise' the OMW strategy and support their teams through change.
- Explore what being a Changemaker means and how can they can empower themselves and colleagues to effect positive change in OMW.
- Manage people performance and stakeholder relationships more effectively and engage their teams in a continuing development conversation.
- Build and practice specific skills such as managing difficult conversations and giving and receiving feedback, in a psychologically-safe environment.
- Connect with colleagues from across the business and build the foundation for effective collaboration.

Ultimately, the programme would help participants answer CEO Paul Feeney's question,

'WHAT KIND OF LEADER DO YOU WANT TO BE AND WHAT DIFFERENCE DO YOU WANT TO MAKE?'

Identifying the Most and Least Effective Pedagogical Approaches for the Target Audience

The final round of discovery explored the most culturally-effective methods of development to achieve the programme objectives identified in round 2 via half-day workshops with target participants and their managers. The workshops surfaced 'real-life' leadership challenges facing the participants, which were subsequently converted into case studies. Finally, the workshops provided the design team with a better understanding of the models and frameworks that most target participants were familiar with and could be built on as part of the EPF Programme.

Round 3 surfaced the following programme design principles:

- Keep it real, practical, and relevant – provide opportunities to encounter issues faced every day, but with a new mindset and toolset.
- Challenge perspectives and ways of doing things respectfully.
- Create an open and interactive space for dialogue – allow participants to explore, discover, and debate new leadership capabilities.
- Don't reinvent the wheel - align content to frameworks with which people are already familiar, e.g. the Change Curve and Firo-B.
- Avoid promoting the perspective of any single business unit – make the programme inclusive and about the future – not the past.
- Provide participants with multiple opportunities to acquire deeper self-awareness, including 360° feedback.
- Don't use scripted exercises with predefined outcomes such as role plays.
- Utilise action learning to explore specific leadership challenges on their own or in home groups.

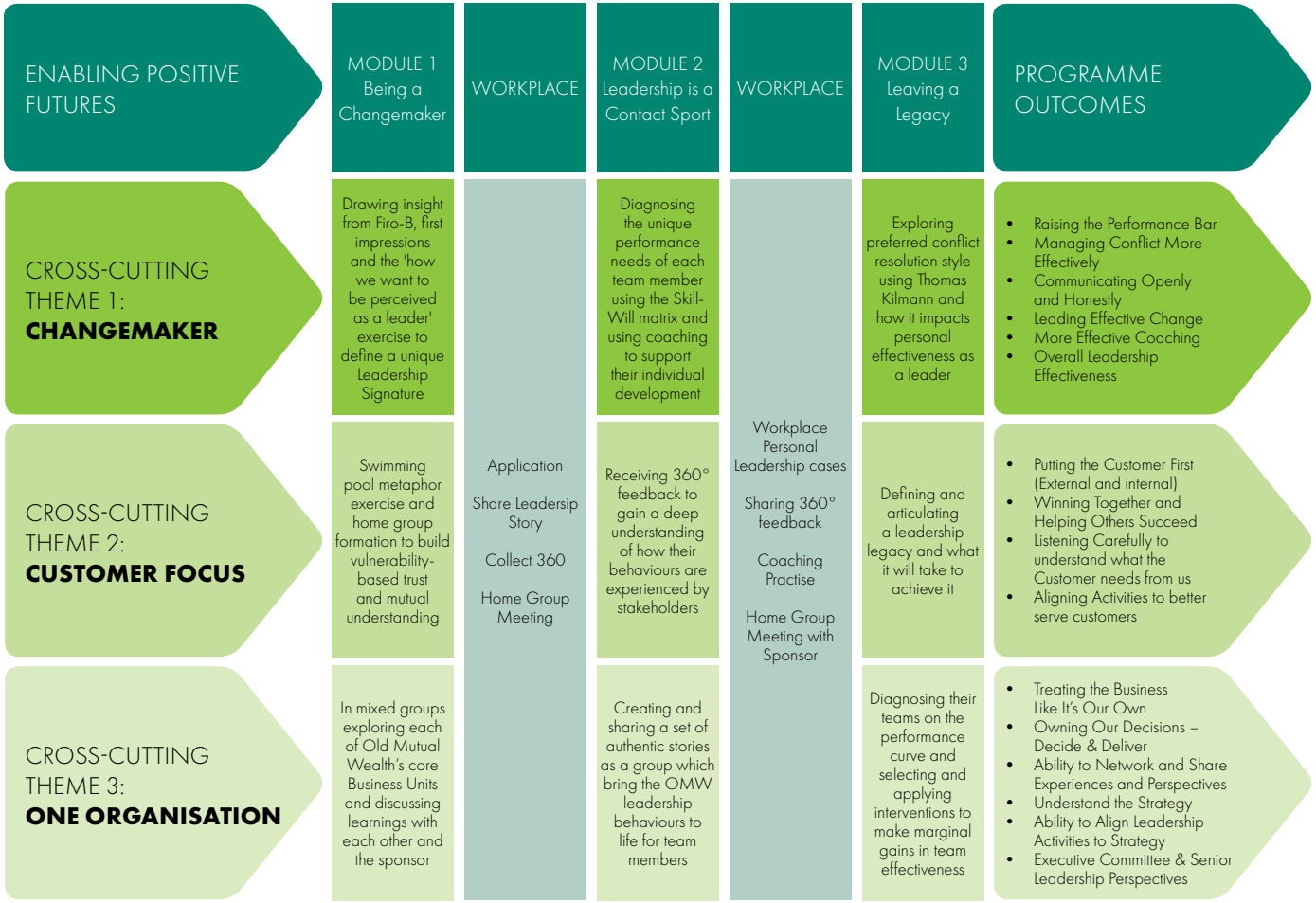
Give participants the opportunity to share their knowledge and experience to 'solve problems collaboratively'.

ENABLING POSITIVE **FUTURES**

Enabling Positive Futures (EPF) is a six-month leadership development programme combining three 2-day classroom modules and a series of planned workplace assignments. Eight cohorts were each sponsored by a senior leader who launched the programme, facilitated a session during the three classroom modules, and provided support and challenge to participants as they applied their learning at work.

Bringing to life one organisation, being truly customer focused, and becoming a changemaker required deep change in the way participants thought about themselves and their role as leaders. Mindset change would not be achieved by teaching the three themes as separate subject blocks. The intention was to weave them into the fabric of EPF, as cross-cutting themes, so participants returned to them repeatedly, from different angles – experimenting, reflecting, testing and learning, and gradually building confidence in their role as business changemaker.

Mindset change would also require the participants to 'honestly work through' real-life leadership challenges, either their own or live cases from the company, to explore issues, debate options and trade-offs, and develop the collaborative solutions necessary for success.



PROGRAMME **LAUNCH**

EPF was designed as an invitation to change, not an instruction. OMW senior leaders (Cohort Sponsors) and the Accelerance facilitators focused on creating a psychologically-safe1 space where participants could choose - or choose not - to play a bigger game on a larger stage. Right from the outset, in the pre-programme communications and at the launch, the intention was to create a strong sense of partnership, and instilled the idea that the programme's success was a shared responsibility.

Module One: Becoming a Changemaker

The first module had a dual purpose: to build an environment where people felt safe to undertake a journey of self-reflection and awareness with colleagues they had never met before; and to lift themselves out of their daily habits and routines to examine the business strategy and the contribution they could make to its delivery.

Psychological safety is a shared belief that a place is safe to take interpersonal risks. To encourage vulnerability and risk-taking, the facilitators marked out a large metaphorical swimming pool and asked participants to move to a place 'in the pool' that reflected how they were feeling about their role. So, people went to the changing rooms, or climbed onto a diving board, or mimicked treading water in the deep-end, or racing up and down a swim lane, or sat on the poolside - and then talked about why this position reflected their role in OMW.

Participants recorded their first impressions of each other. These were collected and shared at the end of the day, again encouraging interpersonal risk-taking. They received FIRO-B reports and explored preferences for inclusion, control and affection, and talked in close-knit 'home groups' about how this impacted the quality of interpersonal relationships in all areas of their lives.

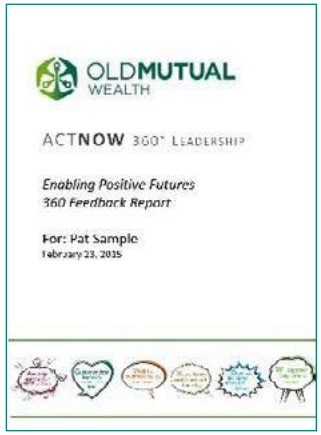
The facilitators convened cross-organisational groups to develop a deeper understanding and appreciation of all the major business units that make-up OMW and the customers they serve. Leveraging each participant's knowledge of their business unit, the groups explored how well the different businesses complement each other via vertical integration and surfaced potential execution challenges. The Cohort Sponsors played a critical role in the dialogue by sharing their perspectives and facilitating a discussion focused on how to overcome the challenges of integration and collaboration, 'that simply made all the jigsaw pieces fall into place'.

Module Two: Leadership is a Contact Sport

While module one encouraged people to self-reflect, and find a version of leadership that felt comfortable – a unique leadership signature – module two was outward-facing, concerned with the impact participants had on the people they led or sought to influence, in all directions.

Home Groups: Participants were formed into mixed groups of 4-6 for the duration of EPF. In these groups participants developed a deeper level of trust to reveal vulnerabilities, discuss their leadership challenges, and develop capacity for listening, mindfulness, feedback and dialogue. Home groups provided distance and perspective to generate insights and tactics.

At the heart of this module was a 360° feedback survey, which had a profound impact. Participants remarked that their level of self-awareness 'had deepened significantly'. Just as they were surprised at the different impressions they made on managers, peers and direct reports, they also began to abandon a 'one-size-fits-all' view of human behaviour. Introducing the principles of Skill and Will increased their ability to differentiate between the people they led based on their personal 'skill and will profiles,' and to be more flexible in their leadership approach.



A key Changemaker tool introduced on this module was coaching. Although the focus was skill development using GROW, the deeper intention was a subtle shift in mindset from being a problem-solver to holding a belief that people are naturally creative and resourceful, and, through coaching, leaders can unlock the unique potential of their team members.

Following the module participants were invited to communicate their 360° feedback and action plans to their stakeholders. This demonstrated listening and commitment to personal development, and role modelled a leadership culture of openness and trust.

Module Three: Creating a Leadership legacy

Participants left module two with a plan, honed by co-coaching, with which to tackle a significant business, customer or change opportunity.

They arrived at module three with stories of success and disappointment! The third module unpacked this experience - the highs and the lows - so participants might better appreciate how to overcome the cultural barriers, and sometimes inertia, they encountered in rising to Paul Feeney's challenge 'to make a difference' in OMW.

Module three focused on four keys to change leadership in OMW. Firstly, building awareness of conflict preferences using the Thomas Kilmann Instrument, and then confidence and skill in tackling difficult conversations, especially when the stakes are high and people are pushed into an uncomfortable place.

Secondly, encouraging participants to lead change through small wins rather than quantum leaps. In advance of the module, they assessed their teams using Patrick Lencioni's five dysfunctions of a team questionnaire and, in their home groups, identified a series of one percent marginal gains that would steadily move their teams up the performance curve, and make people feel they were making progress towards big goals.

Thirdly, by successfully navigating the power dynamics in a hierarchical organisation. During a Tops Middles and Bottoms exercise based on Barry Oshry's Organisation Workshop, participants recognised the complex interplay between people and structure and, in their home groups, discussed strategies and tactics to ensure employees at all levels have an emotional stake in business strategy and change.

And lastly, connecting leaders to their legacy. Knowing what they want to leave behind gives people the energy and resilience to push forward with the changes they want to make, irrespective of the barriers encountered. Legacy is a catalyst for action.

TIMELINE

	2013				2014				2015				2016				
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
THE CHALLENGE	Paul Feeney's Vision to create prosperity for the generations of today and tomorrow		Vertically Integrated Wealth Management Business formed around Skandia UK, Old Mutual International, and Old Mutual Global Investors		Several businesses divested		Intrinsic acquired	Quilter Cheviot acquired									
THE DISCOVERY				Realisation of capability gaps in understanding of the new organisation, true customer focus, and change management			Accelerance appointed by OMW	Discovery begins- dialogue with senior executives	Dialogue with target participants, their managers, and HRBPs								
ENABLING POSITIVE FUTURES								Programme objectives and design principles defined. Programme architecture and detailed module design		Cohort 1	Cohort 2	Cohort 3 Cohort 4	Cohort 5	Cohort 6	Cohort 7 Cohort 8		
THE IMPACT									Impact measurement strategy developed	Post-module Participant Surveys							Post-programme alumni and direct manager surveys
												Cohort 1 Follow-up 360	Cohort 2 Follow-up 360	Cohort 3&4 Follow-up 360	Cohort 5 Follow-up 360	Cohort 6 Follow-up 360	Cohort 7&8 Follow-up 360

IMPACT

Measuring Impact was a primary aim of the EPF programme design process. The goal was to identify and measure observable changes in leadership behaviour and leadership confidence in executing the three programme objectives:

- **Changemaker**
- **Customer Focus**
- **One Organisation**

A single Impact methodology would be insufficient to accurately measure the impact across these three broad themes, so a set of three anonymous processes to measure impact was devised:

1. **Follow-up 360° Feedback Survey**
   Measures the improvement in the participant's Leadership capability and their relationship with followers, peers and management
2. **Post-Module Participant Surveys**
   Measures the Effectiveness of the learning experience from the participants' perspective
3. **Post-Programme Surveys for Programme Alumni and their Direct Managers**
   Measures the alumni's impact on Strategic Execution and Contribution to Business Success

1. Follow-up 360° Feedback Survey: Improvement in Leadership Capability

This was our primary methodology for measuring impact because it measured observable changes in leadership behaviour from the perspective of the participant's key stakeholders.
To capture this perspective, we asked each participant's stakeholders, via a short 'Follow-up' 360° survey, to rate the degree to which each participant improved their leadership effectiveness across three core areas of progress:

1. Improvement against Core Leadership Capabilities
2. Improvement against OMW Core Values
3. Overall Improvement as a Leader

OUR PREMISE

The impact of leadership development programmes is best measured by the rate at which the participants have applied their new skills, knowledge, and mindsets to drive greater organisational, team, and individual performance. These capabilities become observable via their daily leadership interactions with their key stakeholders.

This is best captured through the interactions that these key stakeholders have with these leaders during, and after, the programme because, at its core, Leadership is the relation between a Leader and their followers.

Our Impact Measurement methodology was designed to measure any change in the effectiveness and productivity of the stakeholders' experience with each specific participant.

IMPACT

The 360° follow-up survey was conducted up to two months after completion of the third module for each cohort – or six to eight months after the initial 360° feedback data was collected.

The system was pre-loaded with the stakeholder information from the initial 360° survey, which participants could modify if their stakeholder map had changed over time.

2. Post-Module Participant Surveys: The Effectiveness of the Learning Experience

Throughout the two-year programme, we measured the impact of the learning experience on the participants from their perspective. Measurements focused on their confidence to apply new insights, knowledge and skills back at work. The process was anonymous, which furnish realistic feedback and permitted ongoing modifications to the programme; increasing its value to the participants and their stakeholders.

Each survey was tailored to the specific content of each module. However, we did ask for feedback on the following four statements across all modules:

- I was able to effectively network and share ideas and issues with my colleagues.
- Attending the programme was a valuable use of my time.
- Overall, I would highly recommend this program to my colleagues.
- The facilitation team were engaging, highlighted the issues that impact my performance, and helped me gain new insights into my role as a leader at OMW.

3. Post-Programme Alumni & Direct Manager Surveys: The Business Impact

We received a lot of anecdotal feedback from the cohort sponsors, participants' managers, and the participants themselves. However, to augment and quantify this feedback, we conducted a post-programme Survey in 2017 to assess the impact of EPF on the participants' effectiveness as a leader, the performance of the teams they lead, and the success of the business.

The post-programme survey targeted two populations:

- All programme alumni.
- The managers of all programme alumni.

This provided two unique perspectives on the programme's impact on business success as well as its value to the company and participants.

The survey was structured to measure the programme's impact on three levels:

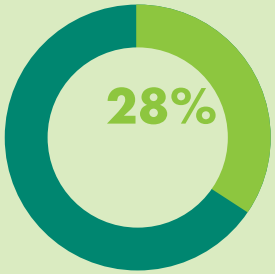
- Alumni's Leadership Confidence.
- Impact on Alumni's Leadership and their Team's Performance.
- Impact on Strategic Execution and the Alumni's Contribution to Business Performance.

Over 75% of the responding Alumni had completed EPF at least six months before they received the survey.

Results from the follow-up 360, module surveys, and the 2017 Alumni Survey revealed a substantial and positive impact against the three programme themes from multiple stakeholder perspectives as follows:

Stakeholders were asked to rate each participant on a progress scale of '-3' to '+3' with:

- '0' being no change
- '1' being Improved Effectiveness
- '2' being Significant Improvement in Effectiveness
- '3' being Great Improvement in Effectiveness



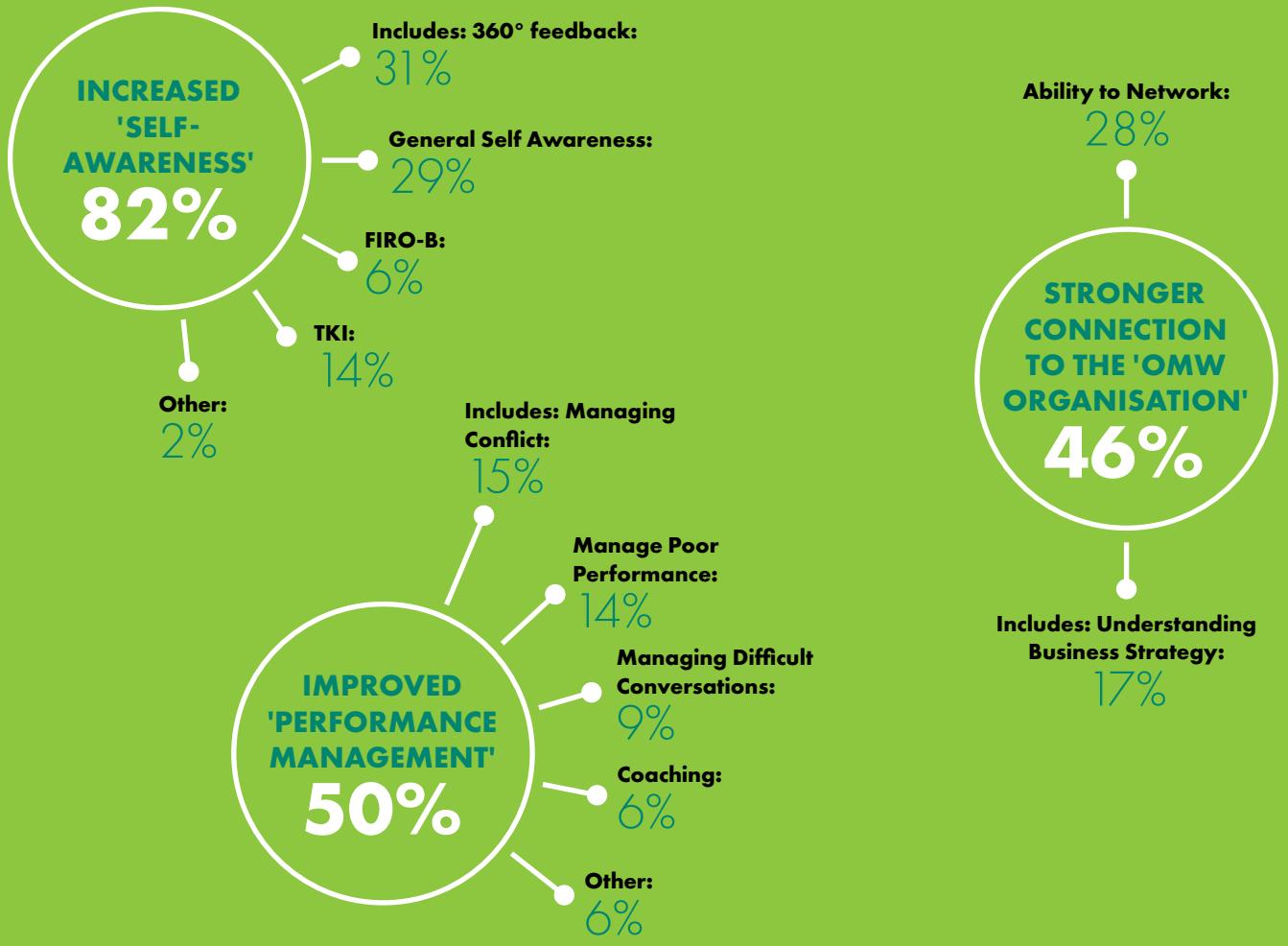
In total, ***967 unique Individuals*** provided 110 Participants with Follow-up 360° feedback.
This represents approximately ***28% of OMW staff*** around the globe.

Provided feedback
Remaining FTEs

The Programme Experience methodology was designed to help us gain an understanding of the confidence that each participant had coming out of a given module to apply their new leadership skills, knowledge or mindset to driving human and business performance.

'MOST IMPACTFUL' TAKEAWAYS FROM EPF PROGRAMME*

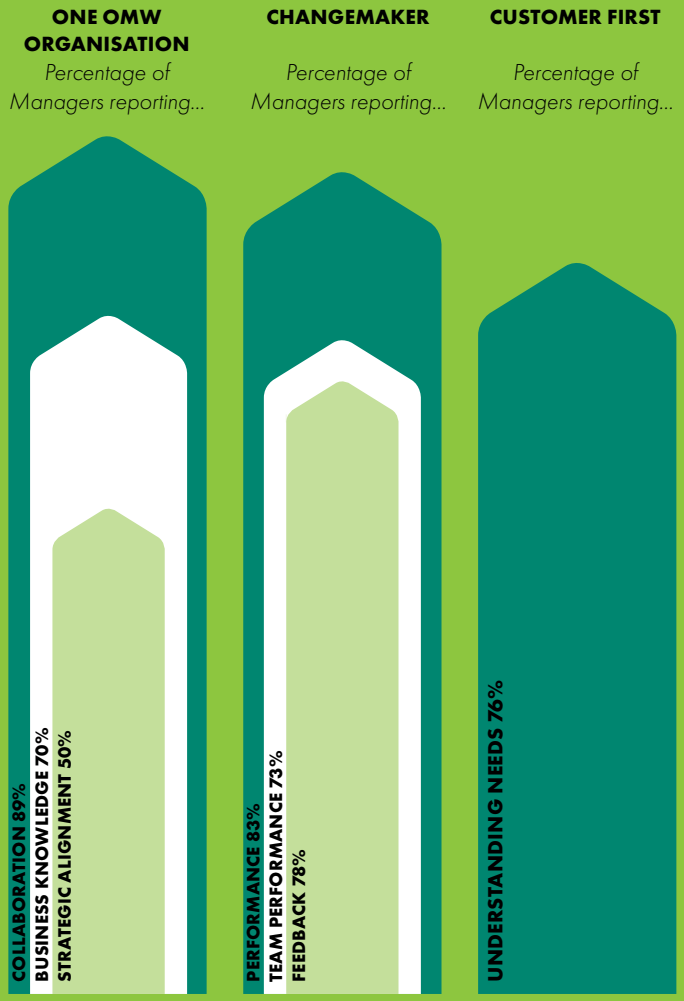
ALUMNI SURVEY



*Percentage of Responding Alumni citing an EPF Programme Element as 'Most Impactful' to them. Alumni cited up to three elements per response. Duplicate respondents have been removed from the three Aggregated Categories listed above, e.g. 'Respondent 25' cited 360, FIRO-B, and TKI as most impactful is tallied as one response as 'Increased Self Awareness.'

'GREATEST IMPROVEMENT MADE BY EPF ALUMNI'

2017 POST PROGRAMME MANAGER'S SURVEY*



* Respondents are the Direct Managers of EPF Alumni. Percentages represent the number of responding Managers who indicated an improvement in the Alumni's leadership capability.

LEADING **CHANGE**

The OMW 'Change-Maker' theme was driven by several core leadership capabilities, which include:

- Raising the Performance Bar
- Managing Conflict More Effectively
- Communicating Openly and Honestly
- Leading Effective Change
- More Effective Coaching
- Overall Leadership Effectiveness

% OF RESPONDENTS	IMPACT MEASUREMENT	METHODOLOGY
74%	of all Stakeholders indicated an improvement in overall Leadership Effectiveness	360° Follow-up Survey
39%	of Direct Reports reported that the participant Substantially Improved in overall Leadership Effectiveness	
76%	of all Stakeholders indicated an improvement in Listening Carefully and Talking Honestly	360° Follow-up Survey
39%	of Direct Reports reported that the participant Substantially Improved in Listening Carefully and Talking Honestly	
75%	of all Stakeholders indicated an improvement in Aiming High & Taking Your Team with You	360° Follow-up Survey
50%	of Direct Reports reported that the participant Substantially Improved in Aiming High & Taking Your Team with You	
73%	of all Stakeholders indicated an improvement in Leading Change	360° Follow-up Survey
44%	of Direct Reports reported that the participant Substantially Improved in Leading Change	
65%	of all Stakeholders indicated an improvement in Managing Performance	360° Follow-up Survey
38%	of Direct Reports reported that the participant Substantially Improved in Managing Performance	
64%	of all Stakeholders indicated an improvement in Managing Conflict	360° Follow-up Survey
38%	of Direct Reports reported that the participant Substantially Improved in Managing Conflict	
83%	of EPF Alumni stated that were raising the performance bar for the teams they lead as a result of attending the programme	Alumni Survey
86%	of EPF Alumni stated that they their performance had improved as a result of attending the programme	Alumni Survey
89%	of EPF Alumni stated that they were providing more constructive feedback as a result of attending the programme	Alumni Survey
76%	of EPF Alumni stated that they were more proactive in seeking feedback on the performance of their teams as a result of attending the programme	Alumni Survey

FOLLOW-UP 360
Manager Comments

He is much more skilled in managing change behaviours. He is leading with boldness, decisiveness and sensitivity.

She enhanced her change management skills, spends more time up front thinking about how people will feel about a change and finding the drivers to help them buy into the process rather than trying to deal with the situation afterwards.

I've definitely seen a change in her leadership approach, particularly in giving her people accountability for their own performance, being more decisive and also using coaching to good effect (for example in addressing quality issues and agreeing quality targets ahead of year-end).

He has gained much more confidence when dealing with conflict and managing poor performance.

He has more firmly established himself as a leader, in part by demonstrating more decisiveness and also working to create a more confident presence.

She has greatly improved how she deals with conflict and poor performance. She has increased her confidence, communicates better and owns the business like never before!

CUSTOMER **FOCUS**

The Customer Focus theme was driven by the underlying concepts:

- Putting the Customer First (External and internal)
- Winning Together and Helping Others Succeed
- Listening Carefully to what the Customer needs from us
- Aligning Activities to better serve customers

% OF RESPONDENTS	IMPACT MEASUREMENT	METHODOLOGY
74%	of all Stakeholders indicated an improvement in in Putting the Customer First – they're the reason we're here!	360° Follow-up Survey
50%	of Direct Reports reported that the participant Substantially Improved in Putting the Customer First – they're the reason we're here!	
74%	of all Stakeholders indicated an improvement in Winning Together – Helping Others Succeed	360° Follow-up Survey
44%	of Direct Reports reported that the participant Substantially Improved in Winning Together – Helping Others Succeed	
76%	of all Stakeholders indicated an improvement in Listening Carefully & Talking Honestly	360° Follow-up Survey
39%	of Direct Reports reported that the participant Substantially Improved in Listening Carefully & Talking Honestly	
83%	of EPF Alumni stated that they were raising the performance bar for the teams they lead as a result of attending the programme	Alumni Survey
86%	of EPF Alumni stated that their performance had improved as a result of attending the programme	Alumni Survey

FOLLOW-UP 360
Manager Comments

"I have seen a real step up on his focus on the customer – this is shown in how he explores different options for clients. He takes a wider view when seeking solutions. He is doing a lot more coaching with his direct reports to sharpen their customer focus."

"The significant improvement she has made in customer focus can be attributed to the improvement in her network, more collaboration and sharing of ideas, concerns, and issues."

"He has a more tangible focus on customer outcomes. I think the EPF course directly had an impact in terms of highlighting this for him as a strategic focus and one that leaders need to champion in order that we collectively achieve our purpose."

ONE **ORGANISATION**

Executing the OMW Vertical Integration business model was a challenge to an organisation that had traditionally operated as a set of autonomous business units with very little experience in cooperating or collaborating with each other.

The One Organisation theme was driven by the underlying concepts:

- Treating the Business Like It's Our Own
- Owning Our Decisions – Decide & Deliver
- Ability to Network and Share Experiences and Perspectives
- Understand the Strategy
- Ability to Align Leadership Activities to Strategy
- Executive Committee & Senior Leadership Perspectives

% OF RESPONDENTS	IMPACT MEASUREMENT	METHODOLOGY
73%	of all Stakeholders indicated an improvement in Treating the Business Like It's Our Own	360° Follow-up Survey
38%	of Direct Reports reported that the participant Substantially Improved in Treating the Business Like It's Our Own	
74%	of all Stakeholders indicated an improvement in Own Our Decisions – Decide & Deliver	360° Follow-up Survey
38%	of Direct Reports reported that the participant Substantially Improved in Own Our Decisions – Decide & Deliver	
75%	of all Stakeholders indicated an improvement in Aiming High & Taking YourTeam with You	360° Follow-up Survey
50%	of Direct Reports reported that the participant Substantially Improved in Aiming High & Taking Your Team with You	
75%	of EPF Alumni stated that they are more effective at aligning the activities of their teams to the execution of the OMW strategy as a result of attending the programme	Alumni Survey
79%	of EPF Alumni stated that they are contributing to the success of OMW by being more knowledgable about how they can help OMW meet its goals and objectives as a result of attending the programme	Alumni Survey
90%	of EPF Alumni stated that they are collaborating more often with peers and colleagues as a result of attending the programme	Alumni Survey
56%	of EPF Alumni stated that they are using their EPF network to share ideas, access expertise, solve problems, share experience and generate new opportunities as a result of attending the programme	Alumni Survey
92%	of EPF Participants agreed (43%) or strongly agreed (49%) with the statement, 'i have a better understanding of the OMW strategy and feel confident that i can communicate it to my stakeholders and direct reports.'	Module 1 Survey
99%	of all EPF Participants Strongly Agreed (60%) or Agreed (39%) with the statement, 'i was able to effectively network & share ideas & issues with my colleagues.'	Module 1 Survey

COHORT SPONSOR PERSPECTIVE

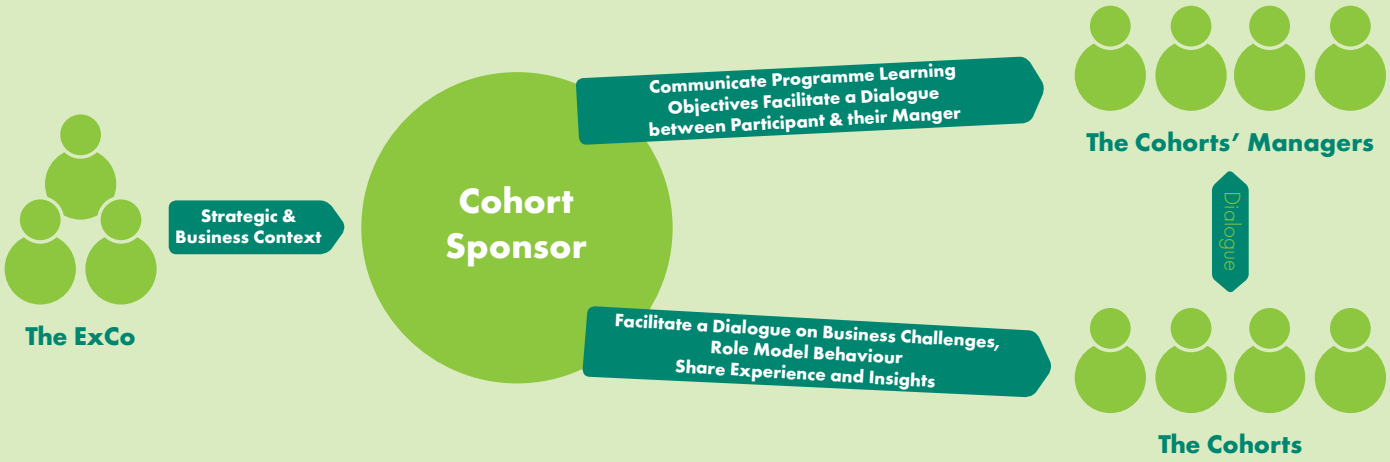
It was important that senior leaders 'role-model' collaborative behaviours and advocate the logic behind the OMW Vertically Integrated Strategy, in turn accelerating the integration of autonomous business units into a single high-performing organisation.

Cohort Sponsors

One of the key design features was the use of senior leaders as Cohort Sponsors, with each Cohort having a different senior leader representing a different operating business or function of OMW. This ensured that the programme maintained a strong focus on driving business success. The Cohort Sponsors shared their experience and perspectives on the leadership challenges facing the organisation and the participants as individuals.

Cohort Sponsors also maintained a regular dialogue with the participants' Direct Managers, to encourage them to follow-up with their Direct Reports to:

- Share what they learned in each module and how to apply it
- Completed their inter-module assignments



COMMENTS FROM COHORT SPONSORS

Participants Motivated and Prepared to Drive OMW Success:

'My cohort was fully engaged and eager to assess and apply what they learnt. The result was an integrated and interactive group that gained significantly from sharing their experiences and aspirations.'

Making the Leadership Challenges Tangible:

'Being a sponsor enabled me to add context and my experiences to the topic in hand; something that makes the issues 'live and breathe'. This coupled with the informal interaction on a one-to-one, group or cohort basis, I believe is the real value a sponsor brings.'

Participants Motivated and Prepared to Drive OMW Success:

'My cohort left the course having tangible ideas on how to enhance their value in their current role, but also with a greater appreciation of how their actions and approach have wider implications not only for themselves, but for their teams, business and indeed the OMW group as part of their wider integration strategy.'

PARTICIPANT **PERSPECTIVE**

% OF RESPONDENTS

88%

IMPACT MEASUREMENT

of all EPF Alumni stated that attending the EPF Programme has been valuable to their career

METHODOLOGY

Alumni Survey

WHAT WAS THE MOST VALUABLE ELEMENT OF THE EPF PROGRAMME?

PARTICIPANT COMMENTS

'Networking and understanding the viewpoints of those from other areas of the business. Also, getting a clearer understanding of how all areas fit together.'

'Personally, I learnt a lot; about the principles of the vertically integrated business model but also about me as a person. Whether it was the first impressions people have of me, the 360 feedback to my leadership preferences and how to deal with awkward conversations and situations!'

'The session on the OMW strategy, which broke down the sections of each of the businesess that make up OMW, was most valuable to me. The knowledge I gained through my fellow participants will be invaluable when looking at specific instances, which might affect my business area. I can look to them to see how they are working through the same or similar issues to ensure consistency across OMW.

'Everyone was happy to share and learn from others which meant we weren't from OMIP, International, QC, Intrinsic, OMGI or Group we just worked for Old Mutual Wealth!

MANAGED **SEPARATION**

At the beginning of 2016, Old Mutual Group, the parent of OMW, announced it was breaking up into its four operating businesses to release shareholder value.

One of those four businesses is OMW, which is in the process of becoming a listed entity on the London Stock Exchange. This development has further accelerated the rate of change in the organisation.

Senior Management has been vocal in their assessment that the EPF Programme has played a significant role in helping the organisation execute the Vertically integrated OMW strategy accelerating the ability of OMW to become an independent, publicly traded organisation.

Highlights Include:

% OF RESPONDENTS	IMPACT MEASUREMENT	METHODOLOGY
56%	of EPF Alumni stated that they were better equipped to manage the leadership challenges they face with Managed Separation as a result of attending the programme	Alumni Survey
78%	of EPF Alumni stated that they are contributing to the success of OMW by being more knowledgable about how they can help OMW meet its goals and objectives as a result of attending the programme	Alumni Survey
82%	of EPF Alumni stated that they were raising the performance bar for the teams they lead as a result of attending the programme	Alumni Survey
86%	of EPF Alumni stated that their performance had improved as a result of attending the programme	Alumni Survey
89%	of EPF Alumni stated that they were providing more constructive feedback as a result of attending the programme	Alumni Survey
83%	Of EPF Participants stated that they were making a priority of understanding the expectations of internal and external customers to meet their needs as a result of attending the programme	Alumni Survey

ACHIEVING A "STEP CHANGE" **IN LEADERSHIP EFFECTIVENESS**

'We launched the EPF programme at a time of significant strategic change in Old Mutual Wealth. To be successful in this dynamic environment, we knew that we would need great leadership from the leaders who were 'running the organisation' daily. It was a lot to ask these leaders to get involved, but we knew this kind of investment would help evolve our organisation in the longer term and why we launched the programme in Q2 2015.

Two years later, I couldn't be happier with the results. The confidence, skill and positive, can-do attitude of the EPF leaders has greatly benefited our organisation'

PAUL FEENEY
CEO, Old Mutual Wealth and Programme Sponsor

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ENABLING POSITIVE FUTURES AT
OLD MUTUAL WEALTH

APPENDICES

PAGE

APPENDIX I
360° FOLLOW-UP SURVEY RESULTS 20

APPENDIX II
SPONSOR'S BIOS 21

APPENDIX III
PROGRAMME DIRECTOR BIOS 29

APPENDIX I

360° FOLLOW-UP SURVEY RESULTS

EFFECTIVENESS IN ADDRESSING POOR PERFORMANCE

	No Change	Positive Change	Significant Change	Overall Positive Change
Overall	29%	26%	44%	71%
	10	9	15	
Managers	25%	0%	75%	75%
	2	0	6	
Direct Reports	13%	40%	47%	87%
	2	6	7	

EFFECTIVENESS IN ADDRESSING POOR PERFORMANCE

	No Change	Positive Change	Significant Change	Overall Positive Change
Overall	29%	29%	43%	71%
	10	10	15	
Managers	22%	11%	67%	78%
	2	1	6	
Direct Reports	13%	44%	44%	88%
	2	7	7	

EFFECTIVENESS IN ADDRESSING POOR PERFORMANCE

	No Change	Positive Change	Significant Change	Overall Positive Change
Overall	28%	31%	42%	72%
	10	11	15	
Managers	20%	20%	60%	80%
	2	2	6	
Direct Reports	12%	47%	41%	88%
	2	8	7	

EFFECTIVENESS IN ADDRESSING POOR PERFORMANCE

	No Change	Positive Change	Significant Change	Overall Positive Change
Overall	27%	32%	41%	73%
	10	12	15	
Managers	18%	27%	55%	82%
	2	3	6	
Direct Reports	11%	50%	39%	89%
	2	9	7	

EFFECTIVENESS IN ADDRESSING POOR PERFORMANCE

	No Change	Positive Change	Significant Change	Overall Positive Change
Overall	26%	34%	39%	74%
	10	13	15	
Managers	17%	33%	50%	83%
	2	4	6	
Direct Reports	11%	53%	37%	89%
	2	10	7	

EFFECTIVENESS IN ENCOURAGING OTHERS TO ACT LIKE OWNERS

	No Change	Positive Change	Significant Change	Overall Positive Change
Overall	15%	32%	53%	85%
	5	11	18	
Managers	25%	50%	25%	75%
	1	2	1	
Direct Reports	0%	33%	67%	100%
	0	2	4	

EFFECTIVENESS IN ACTIVELY SOLICITING FEEDBACK ABOUT OWN PERFORMANCE

	No Change	Positive Change	Significant Change	Overall Positive Change
Overall	50%	18%	32%	50%
	14	5	9	
Managers	50%	25%	25%	50%
	4	2	2	
Direct Reports	36%	18%	45%	64%
	4	2	5	

EFFECTIVENESS IN DELEGATING DECISION-MAKING TO THE APPROPRIATE INDIVIDUAL

	No Change	Positive Change	Significant Change	Overall Positive Change
Overall	18%	32%	50%	82%
	6	11	17	
Managers	29%	29%	43%	71%
	2	2	3	
Direct Reports	22%	22%	56%	78%
	2	2	5	

APPENDIX II

COHORT 1 SPONSOR

Name: Lynzi Harrison
Position: UK Operations Director
Business Unit: Old Mutual Wealth

Biography:

I started my career in accounting working in a local accountancy firm, but quickly moved into industry to work for HSBC Corporate Finance. One of my first roles was as part of a team working on the monthly accounts and submission to Head Office. During my time at HSBC I introduced activity based costing (ABC) into General Insurance division. The information was used to inform decision making, particularly for product costing and product profitability.

I joined Skandia (now OMW) in October 2000 to lead a project team implementing ABC. Following successful delivery I moved on to managing the Cost team and the role expanded over the following years to eventually becoming Head of Wealth Management Accounting. In my time in Finance I have lead all teams, with the exception of Actuarial. This includes Operational and Financial Accounting teams in Milan, Paris, IOM and Southampton.

In 2012 I moved to UK Operations to expand my knowledge of the wider business, and in particular to gain experience of working in an environment which is much closer to the Advisor and end customer. This has been a great enabler in my development, stepping out of my comfort zone. Upon arriving in Operations I became almost immediately involved in the IFDS outsourcing project and became a key member of the team that delivered the contract, which resulted in my appointment as contract owner and head of service delivery for IFDS BPO

My current role is as Head of Operational Assurance, providing technical and regulatory assurance for Operations. In addition to assurance activity the function manages all BAU change for Operations which also includes Lean, Operational Excellence and Six Sigma. Since the successful signing of the IFDS contract the role also has the responsibility for the relationship management of IFDS and working with the Oval Programme team to deliver Operational Business Readiness.

APPENDIX II

COHORT 2 SPONSOR

Name: John Mitchell
Position: Head of Capital
Business Unit: Old Mutual Wealth

Biography:
With a background as an actuary John has been developed a strong career in financial planning and reporting. Working from his early days at Crown Financial and Pearl Assurance, he joined Skandia in 1997 as a senior actuarial student designing and developing an actuarial projection system to model an accumulating with-profits fund (If that's make sense). Developing his specialist career, John progressed through several senior actuary roles until 1997 when he became Head of Actuarial Shared Services managing a department of 50 people focusing on providing actuarial services to the various business units within the Skandia Group.

In 2011 John moved into the role of Head of Financial Planning and Reporting for Old Mutual Wealth looking after a function consisting of approximately 100 people who are responsible for Financial Reporting & Regulatory Returns. He has also been involved in a number of cross business projects including the design and development of a new actuarial policy by policy projection system to be used for all aspects of financial reporting and is also responsible for the construction of the company's business plan over a 5 year period detailing explanations for the movement in key drivers such as solvency position, dividend capacity, company tax position, embedded value profits and new business profit margins.

Recently John took up a new role, the UK Business Partner which acts as a link between finance and the business.

All of this has given John a unique 'specialist' view on the business and its growth as we focus on our vertical integration plans. Outside of work, John spends most of his free time with his family but when he is allowed he likes to watch sport being a keen supporter of Wigan Rugby League and anything which we are currently beating the Aussies at.

APPENDIX II

COHORT 3 SPONSOR

Name: Stephen Harrison
Position: Head of Dealing & Portfolio Financing
Business Unit: Old Mutual Global Investors

Biography:

Stephen Harrison was appointed to his current role (Head of Dealing & Portfolio Financing) in June 2008, in which capacity he is responsible for all trading flow through OMGI's centralised dealing desk, as well as efficient commission management, prime brokerage relationship management, equity financing and yield enhancement strategies. Prior to this he was Head of Portfolio Finance (March 2007 – June 2008), having previously been Head of Investment Operations (2000-07), a role which encompassed a range of operational responsibilities, including dealing, contract relationships, NAV signoffs and fund administration facilities.

He joined OMGI in 1996, initially working as a portfolio assistant, involved in all aspects of quant modelling and dealing, before being responsible for the establishment of the centralised dealing desk.

Stephen has a BSc in Economics with Accountancy from Loughborough University (1996) and an MSc in Economics from Southampton University (1996). He is IAQ-qualified, an Associate of the IIMR and an Associate Member of the Securities Institute.

APPENDIX II

COHORT 4 SPONSOR

Name: Darren Sharkey
Position: Director of Finance
Business Unit: Old Mutual Wealth

Biography:
Darren has worked for Old Mutual/Skandia for more than 15 years in a variety of finance roles and across a number of business lines. He iscurrently Director of Finance for Old Mutual Wealth responsible for all aspects of Finance across the business.

Prior to that Darren was the Product Director, where he was responsible for new and existing products across the UK Platform, protection and International businesses. This involved working with Skandia/OMW businesses in a number of European and Latin American markets.

Darren enjoys learning new things, building teams, problem solving and working with the broader business. He is the proud father of two teenage daughters and a Chartered Accountant.

APPENDIX II

COHORT 5 SPONSOR

Name: Emma Hollingworth
Position: Mortgage Sales Director
Business Unit: Intrinsic

Biography:
Emma has over 20 years' experience as a mortgage professional and is now Mortgage Sales Director at Intrinsic Financial Services.

Emma was previously at Countrywide and before that was director of mortgages at SimplyBiz Mortgages. In her current role, she is responsible for growing Intrinsic's presence and influence in the market, growing market share, lending volumes and lender relationships, sales process and also supporting Intrinsic's mortgage ARs.

APPENDIX II

COHORT 6 SPONSOR

Name: Kjirste Coltham
Position: Delivery Assurance, Service Management and IT Transformation Director
Business Unit: Old Mutual Wealth

Biography:
Joined what was Skandia Life in August 1995 as part of the IT Graduate Trainee programme, I have undertaken various roles within the IT function, programming, team leading, project management and (what I discovered to be what I really enjoyed within IT) live support! I began by actually doing live support and over time progressed to running the iSeries support team before merging 5 discrete teams within IT into one Central Application Support function.

Following the purchase of Skandia by Old Mutual in 2006 I moved into the retained IT function and I am now Delivery Assurance and Service Management Director responsible for the provision of live IT services to Old Mutual Wealth.

I assumed the role of chairperson for the Old Mutual Wealth Women's network in August 2014.

APPENDIX II

COHORT 7 SPONSOR

Name: Andy McGlone
Position: MD, London Investment Management
Business Unit: Quilter Cheviot

Biography:
Andy has overall responsibility for the front office functions based out of our Kingsway Head Office including the London based investment managers and their support teams, our investment research department, the dealing team and our London based business development managers. He sits on the Executive Committee, the Risk Committee and the Client Money & Counterparty Committee.

Having joined what was then Quilter Goodison in 1994, Andy has more than 20 years' experience of managing portfolios for individuals and trustees of pension funds and charities, and is a Chartered Fellow of the CISI.

Andy is married with two children and lives in Surrey.

APPENDIX II

COHORT 8 SPONSOR

Name: Helen Wallace-Smith
Position: Director of Finance Integration
Business Unit: Old Mutual Wealth

Biography:
I have worked within our business for 18 years, holding a number of leadership roles within IT, Risk, Operational Management and latterly Change Management and Transformation to support Vertical Integration within the Old Mutual Wealth Finance function. I have a proven track record of success in delivering results through self and motivating others towards clearly stated vision, direction and purpose.

I am a leader of significant organisational and business change, both process and cultural. I have applied effective influencing skills applied at Industry, Regulator, Board, Leadership and Operational levels. I have the opportunity to demonstrate Strategic awareness combined with experience of embedding change. I have performed the role of coach and mentor for a number of individuals within the organisation and it is truly inspiring to see them develop and achieve in their own right.

APPENDIX III

PROGRAMME DIRECTOR

Name: Nick West
Position: Learning & Development Business Partner
Business Unit: HR

Biography:
Nick is an L&D professional with Old Mutual Wealth. Having started his career with Lloyds Banking Group building an early career in Sales, he moved into people management as a Branch Manager. This was where his passion for developing people grew to lead career decisions.

After two years in branch management he moved into Learning & Development working across a UK based network. Working for Lloyds included developing training in sales, customer service and systems in both the branch and call centre environments, during which time the Learning & Development Team where winners of a National Training Award for Large Employers in Wales.

Moving on from Lloyds, Nick expanded his experience in the Defence industry working for QinetiQ looking after business-wide programmes and managing a team of trainers through a period of considerable change.

His current role as an L&D Business Partner at Old Mutual Wealth saw him as the specialist bringing the Enabling Positive Futures programme to live and building a relationship with Accelerance. Day to day, Nick works with the Old Mutual Global Investors and Quilter Cheviot
business areas with their People Strategies. Recently Nick has also been working on the implementation the Old Mutual Wealth's Managed Learning Service.

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APPENDIX III

PROGRAMME DIRECTOR

Name: Dr Mark Jenner
Position: Programme Director

Biography:

Mark is an Associate in Accelerance for Europe and has been running his own leadership development consultancy since 2004. Mark previously held senior learning and organisational development roles in Barclays Bank, Ernst & Young and Bovis Construction Limited. While at Bovis Mark completed his PhD on how project teams can be designed for high performance.

Mark helps Business and HR leaders improve the performance of their teams and organisations. He is privileged to have worked with Mace, Atkins, HSBC, Genesis Housing Association, BP, Associated British Foods, Laing O'Rourke, Deloitte, Dentsu Aegis Network, BG Group, Vodafone, Pokémon, AstraZeneca, and Unilever, among others.

Mark has a track record of innovation in learning and development. While at Ernst & Young, Mark led the design and implementation of a Virtual Business School which won the prestigious Corporate University Xchange European Excellence Award. Before that he built two pioneering Masters Degree courses in Construction Project Management (with Brighton University) and Work-Based Learning (with Middlesex University), the latter of which was awarded a Queen's Anniversary Prize for Higher and Further Education.

Contact Dr Mark Jenner:

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APPENDIX III

PROGRAMME DIRECTOR

Name: Michael Maffucci
Position: Programme Director

Biography:

Mike aims at improving Business Results by maximizing the Leadership Capability & Management Productivity of Executives, Leaders, & Organizations. Mike is a Founding Partner at Accelerance and recently has become a member of the Forbes Coaching Council, an invitation-only community for leading business and career coaches. Over the past 10 years, Mike has worked with many Fortune 500 clients, Mid-sized companies, and leading international organizations such as the World Economic Forum.

Mike works from four fundamental principles:

1. Leadership is a relationship between a Leader and their Followers.
2. Trust is the foundation of the most productive relationships.
3. Leaders provide purpose & meaning to enable followers to move forward towards meaningful goals
4. Business Success requires leaders to effectively acquire and efficiently utilize the resources (Capital, Human, Operational) needed to drive positive business change and performance.

As an Executive Coach, Mike works with executives in Europe, the Americas and Asia to improve their personal leadership effectiveness and management capability as well as those of the teams they lead. These executives are leaders across a broad array of industries including Financial Services, Technology, Chemicals, Engineering, and Construction.

He understands that behavioural change can be difficult, which is why he co-develops "behavioural experiments" with his coaching clients. These "experiments" are designed for the leader to test and enhance new leadership behaviors, which builds security and confidence. In addition, the experiments can be used to test assumptions and explore the "Personal and Professional Interests" of their key stakeholders. The insights gained help these leaders tailor their communications and conflict management strategies with each stakeholder to drive change and maximize performance.

Mike also designs & delivers management & leadership programs for industries including Financial Services, Chemicals & Pharmaceuticals, & Construction. He has delivered these programs in Asia, Europe, and the Middle East, and the Americas and also collaborated with many 'world renowned' academics such as Gary Hamel, CK Prahalad, Marshall Goldsmith, Andrew Campbell, and Jay Conger among others. Mike holds a BS in Physics from Franklin & Marshall College and currently serves on the boards of various charitable and educational organizations in the New York and Atlanta areas.

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