



Curtis Banks Management Development

About Curtis Banks

Curtis Banks, part of the Nucleus Financial Platforms group, helps nearly 5,000 advisers make retirement more rewarding for almost 250,000 customers.

Leading the way in self-invested pensions with award-winning self-invested personal pension (SIPP) and small self-administered scheme (SSAS) product offerings, Curtis Banks specialises in providing solutions for customers with complex retirement needs. Its comprehensive set of solutions supports financial advisers and their clients across the full wealth spectrum. And since 2009, the business has grown through a combination of acquisitions and organic growth, whilst retaining a keen focus on service, modern technology and innovation.

The Challenge

Employee surveys identified a significant training and development gap across Curtis Banks' UK sites. First-line managers and newly promoted managers wanted structured professional management development. Due to the company's history of organic growth and acquisition, different managers approached their roles in varying ways.

In addition, the high net worth of their customers - often business owners themselves - and the nature of Curtis Banks products, created very high expectations on service levels for Curtis Banks teams and their managers.

Curtis Banks had approximately 80 first-line managers based at their three sites in Ipswich, Bristol and Dundee. The Learning and Development (L&D) team were keen to see that any developmental work was customised to the needs of their organisation.

Learning needs analysis by the company's L&D team highlighted several areas where this group felt ill-equipped. These included managing conflict, expectations management, coaching individuals, evaluating team members, motivating others and giving and receiving feedback. Flexing management and leadership styles, recognising and overcoming barriers to communication and driving continuous improvement were also considered vitally important.

In the background, Curtis Banks was in the process of being taken over by Nucleus leading to understandable uncertainties among front-line managers and their teams.



Our Solution

PEAR designed a management development course that was highly tailored to this group's specific needs. We ensured that the learning situations and examples were taken from and applied to, their day jobs. Courses were delivered face-to-face at sites in Dundee, Bristol and Ipswich.

We facilitated discussions around purpose at work, where it comes from and how your purpose as a manager links to your organisational goals, mission and values.

With the uncertainty of a takeover and the lack of clarity on strategy, PEAR worked hard with managers so that they could use that sense of purpose to guide and motivate their teams and energise themselves.

Building accountability in others was another key theme and we facilitated sessions which focused on flexing management styles, using coaching approaches to 121s and using communication tools to invite responsibility. PEAR also employed some of this thinking to help front-line managers become more effective at managing upwards.

Applied theatre was used to explore conflict at work, using examples that allowed us to work one step removed from managers so they could see and experience what went on during a conflict situation.

We used psychological education to process the thoughts, feelings and behaviour of both parties during these situations and encouraged participants to practice the skills surrounding conflict and having difficult conversations.

These three themes of purpose, accountability and conflict helped greatly, with participants understanding who they were as managers and what the role of a manager meant. In turn, this meant that managers could better help their teams set and deliver on consistently high service targets.

The use of applied theatre, skills practice, pair exercises and adult discussions provided a rich learning environment that made the sessions enjoyable, memorable and effective.



The Impact

Feedback from the programme was overwhelmingly positive with participants both enjoying and learning from their attendance. Between each of the sessions, participants applied their learnings and in the following sessions, discussed both the changes in their behaviour as managers and the impact on the results and performance of their teams.

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I thoroughly enjoyed the sessions and making use of the techniques you have taught us.

Elaine Acolatse, Team Leader

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Thank you for running such a great programme for us ...at just the right time.

Simon Vinton
Group Learning and Development Manager

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