



Business Impact

“This is a great piece
of work and
very essential
for HSBC as a whole.”

— Key HSBC business stakeholder

CASE STUDY

Helping HSBC Handle Change

Situation

HSBC, a leader in the financial industry, recognized that change and disruption come from all directions, including political, regulatory, legal, and personal. Change affects the way companies do business. HSBC also recognized the need to support all of its employees to effectively handle change.

- Using the **Learning 3.0** approach to shift to a more **learner-centric** learning path integrated with employee performance needs.

The Challenge

Considering these developments, including significant and ongoing change across almost every aspect of its operations, HSBC's Global Retail Banking and Wealth Management (RBWM) Learning Academy approached GP Strategies to design an innovative training solution to help HSBC employees better manage themselves, and support their colleagues, through stressful change events. HSBC had change management training modules in place for supervisors and management, but recognized that all employees needed this information directly.

The HSBC global learning organization was also undergoing changes. It was transitioning to:

- Role-based learning
- A 70/20/10 learning approach (called Learning 3.0)
- A new learning portal
- A new learning brand identity (called HSBC University)

HSBC was changing how it approached employee learning and development. The company was beginning to look at how to make learning more modern, engaging, visual, media driven, and targeted. The HSBC Global RBWM Learning Academy identified the urgent need for learner-centric training to meet employees at the intersection of role, need, and performance.

GP Strategies® Solution

Understanding the needs of HSBC, GP Strategies created the Handling Change course. The learning objectives for Handling Change are:

- Recognize the effects of the fast-changing world in which you live and work.
- Describe the effects of change in your work environment and the opportunity the change presents.
- Identify the effects of change on yourself and your colleagues.
- Outline appropriate strategies to help yourself and others move effectively through each stage of the change process.

The straightforward learning objectives for Handling Change aligned to HSBC's organizational needs. The audience included employees in all roles, across all geographic areas, in the company. One intent of the course was to help employees handle change in their personal lives as well as their professional roles in the bank. The content reflected this sentiment—that

change comes from all directions, and we as people in the world must adapt and be flexible enough to handle it properly.

The course was structured into sections that covered the learning objectives and framed the areas HSBC requested. The five sections addressed the learning objectives individually and collectively. Each section had micro-lessons designed to stand alone, enabling users to explore as they had time or need. The GP team identified core obstacles, qualities, behaviors, and theories relevant to the topic of change management, and then wove them together throughout the course to make the course feel more cohesive.

The course's sectioned topical themes are:

- Introducing change
- Change theory
- Navigating change
- Supporting others through change
- Growing through change

Business Impact

The feedback from HSBC Global RBWM Learning Academy and business stakeholders was overwhelmingly positive. They were excited to have training that resonated with learners in any role throughout the bank, from branch tellers to vice presidents to executive leaders to relationship managers.

The course has become a model in many areas for both HSBC and GP Strategies. It enabled discussion on and empowered adoption of an agile working approach. Handling Change provided the opportunity for a greater level of dialogue and creative collaboration both between HSBC and GP Strategies teams and within the organizational teams. The HSBC team watched and worked with the GP Strategies team to see the step-by-step construction of the course.

At project close, multiple HSBC stakeholders expressed their appreciation for the final product and the process:

- **Global Retail Banking and Wealth Management Academy Manager, HSBC:** “This course was really, really good. I really enjoyed going through it. This is a huge compliment for your team. Your team has taken the time to be creative and make it easy for us.”
- **People Experience Training Manager, HSBC (UK):** “This course has really been a joy to review. Thank you for showcasing it to us each week. Your team has made this extremely easy for us to review by showing it to us the whole way and getting feedback the whole way. You are also really open to our feedback — what a pleasure!”
- **Senior Training Manager, Global Contact Centers, HSBC (US):** “[GP Strategies PM] and [GP Strategies lead ID] were exemplary. I liked the show-and-tell working style of the meetings week to week. The GP [Strategies] team was open to feedback, proactive and cooperative.”
- **Director, Contact Centers People Development/Operational Training & Competency (US):** “I have been very vocal to others in the Bank that I am very pleased with this project. I am putting this as a model [for other training projects]: Can we do it ‘this style?’”

Level 1 feedback from learners includes the following:

“I must say that I always felt I was not receptive to change. ... The results showed that I am pretty moderate in my approach to any change and that is actually encouraging for [my]self.”

“I have completed the learning myself and find it extremely valuable; I believe this would be of use to employees on site.”

“I relaunched the learning and as soon as I did I remembered it. (Learning originally done in [Q3] last year.) The great thing is that I can work through it again six months after last time and take new parts of it. ... Content is great and covers numerous topics and aspects of change. ... [I] like the navigation and the ability to work through topics specific to you ... That means you can use it as a guidebook rather than a one-off eLearning.”

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About GP Strategies

GP Strategies is a leading workforce transformation partner—one of the few truly dedicated global providers in the marketplace providing custom solutions. We believe our transformation focus, when paired with deep listening, a customer-centric approach, and innovative expertise, enables our clients to routinely achieve superior business and operational results from our evidence-driven and technology agnostic recommendations.

Whether your business success requires a change in employee performance and mindsets, learning technologies, or critical processes, GP Strategies is the transformation partner you can trust.

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