Accelerating leadership development

Square Peg support

We were asked to project manage the delivery of a Portfolio Management learning programme whilst advising on the overall Academy offering, positioning and stakeholder management approach. One of our Pegs was seconded to the Wealth Academy team for a three month period taking both a tactical and a strategic approach to adding value for the client. Firstly, on the tactical front she focused on managing the delivery of the learning programme. This involved initiating a programme of stakeholder management, obtaining the buy-in and support of key subject matter experts across the business and developing and managing a detailed project plan with internal experts, key audience members and external suppliers. Secondly with a strategic focus, she used her understanding of the wealth management business to challenge the emerging Wealth Academy priorities and gather insights on opportunities from key contacts.

The result

The portfolio management learning programme comprising e-learning and face to face workshops is on track for delivery. Its content and timing are considerably strengthened following our involvement – a big win for the wealth academy reputation. Stakeholders are actively supporting not just this initiative but future offerings. Meanwhile, we have been instrumental in clarifying the agenda and priorities for the Academy over the coming months.

The challenge

One of the UK's leading banks had newly formed a "Wealth Academy" within its Private Clients division. Within its pilot year the academy's task was to deliver an ambitious suite of learning and development programmes to a number of audiences diverse in terms of geography, culture and levels of investment literacy.

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