

CASE STUDY: U.S.-BASED MULTINATIONAL INVESTMENT BANK & FINANCIAL SERVICES FIRM

# Using Leader Data for Insights into Assessment Trends

## The Challenge

### Secure, Structure, Analyze, and Visualize C-Suite/Senior Leadership Data for Insights

A globally recognized, U.S.-based multinational investment bank and financial services firm created a standardized leadership profile to facilitate the objective assessment of hundreds of their senior leaders over the long term.

The standardized leadership profiles were designed to identify (1) role models, strong performers, and at-risk individuals; (2) the required talents and risks associated with specific roles, functions, and divisions; and (3) individual and group-level development needs.

This initiative gave the company access to an extraordinary volume of proprietary, sensitive assessment data specific to its most senior executives.

First and foremost, the data had to be secured and protected. Because this dataset included highly sensitive information on the company's most prominent leaders, particularly regarding their limitations and development needs, it could affect

their current and future opportunities and had to be handled appropriately.

Once secure data-handling protocols had been established, the data needed to be structured, analyzed, and presented to highlight the resulting insights. The company needed to package and present its findings in a manner that would engage and influence senior leadership team members, while demonstrating the value and relevance of the leadership profiles and their data.

Although the company was accustomed to working with confidential, complex financial data, its leadership development team understood that domain-specific guidance and expertise would help safeguard the leadership data and deliver insights to maximize the assessment initiative's impact.

## The Solution

### Focused Expertise and Experience

While extremely capable and experienced, the investment bank and financial services' leadership development team recognized that RHR International's knowledge and C-suite/senior-leadership-specific expertise, as well as its unique

capabilities around data, analysis, and visualization, would enhance their influence and results.

RHR International's technology, systems, and protocols facilitated secure access to the investment banking and financial executives' demographic, assessment, and performance data. This protected environment ensured the data was handled and analyzed confidentially and ethically by RHR and the company's respective teams. The RHR and investment bank and financial services teams' collaborative analyses enabled the cultivation of research questions, resolution of data issues, development of analytic techniques, and reporting of their results. This informal, iterative, transparent, and agile approach encouraged authentic discussion specific to the insights as well as a cohesive partnership. As part of the solution, findings from both quantitative and qualitative data sources were presented in visually intriguing, easy-to-understand dashboards, charts, and graphs. To ensure alignment with the investment bank and financial services firm's brand, company-specific logos, icons, and color palettes were used to engage and lead

viewers through the analytic findings and highlight key takeaways.

## The Results

### C-Suite Talent Insights and Leadership Development Program Improvements

On a variety of projects, RHR has helped the company's leadership development team gain insights into their senior leaders' key strengths and development needs and has further informed their CHRO's talent planning processes. As a result, the firm's CEO and select divisional leaders are more aware of their company's talent goals and challenges and can act accordingly.

Through its collaboration with RHR, the investment bank and financial services firm has continuously improved its approach to leadership development and refined its standardized leadership profile. Its leaders are now more objectively rated against this profile, which is based on specific data and behaviors. The company has also established a structured approach for adding newly assessed leaders to their growing leadership database, allowing them to conduct on-demand analyses based on the most comprehensive data possible.

The investment bank and financial services firm regularly reaches out to trusted partner RHR International to provide, in their own words, "top notch" analytics support and a "sure, steady hand" that ensure their leadership development team meets its data, analytic, and visualization goals.

Their ongoing relationship with RHR helps the company's leadership development team reinforce their relevance to the organization, deliver impactful insights, and influence critical stakeholders' talent decisions.

## ABOUT RHR INTERNATIONAL

RHR International LLP is an independent global leadership consulting firm whose mission is to unlock potential in leaders. Through its behavioral lens, RHR has worked side by side with CEOs, board directors, and senior executives for more than 70 years, helping them acquire the knowledge, wisdom, and skills necessary to achieve business results.

RHR's practical solutions, guided by in-depth analytics, lead to business outcomes that further clients' success. RHR offers Executive Bench®: Talent Pipeline suite of services, Board & CEO Services, Senior Team Effectiveness, Leading Transformational Change, Executive Development, and Executive Assessment across industry sectors. For more information, visit [rhrinternational.com](http://rhrinternational.com).

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