

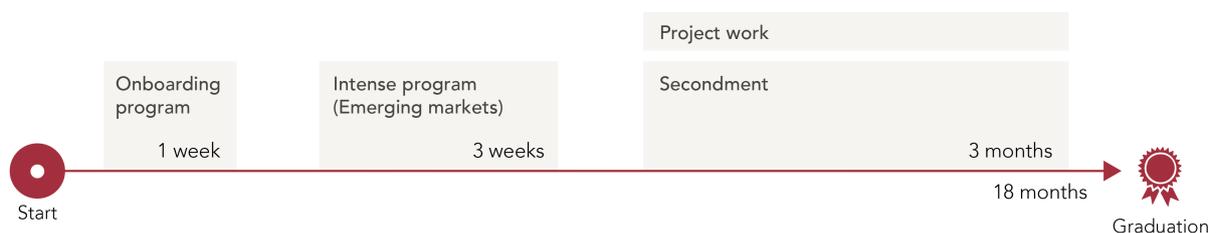
Case Study: Associate Programme for Graduates and Young High Potential Talents

Challenge: A highly successful, wealth management boutique with global operations approached Fintelligence with a mandate to set up and implement an effective programme for graduates, associates and rising talents to be conducted on an annual basis.

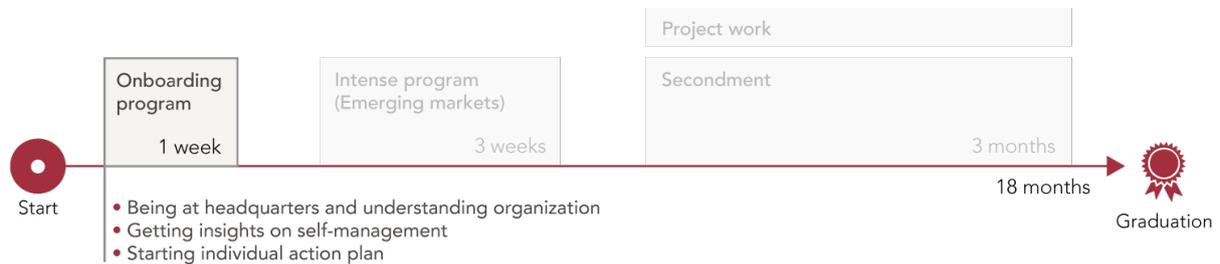
Goals of the programme:

- To increase ability to recruit and retain high quality professionals;
- To provide participants with a good understanding of various aspects of the institution, the key stakeholders and its strategy, in particular the business units and activities in emerging markets, such as Hong Kong, Singapore, and Dubai;
- To foster cooperation between participants and a member of the board to work on a current business case;
- To allow participants to gain insights on self-awareness, leadership styles, intercultural awareness, personality types and own personality preferences, and effective ways of interacting with clients and colleagues;
- To give participants insights on various aspects of investment management, investment categories, behavioural aspects of investment management, client relationship management, and trends in compliance and regulations;
- To challenge participants and to encourage teamwork in order to resolve complex, comprehensive business cases.

Solution: Having identified our clients' needs, we have created an 18-month multi-phased development programme:



A) On-Boarding Phase at headquarters

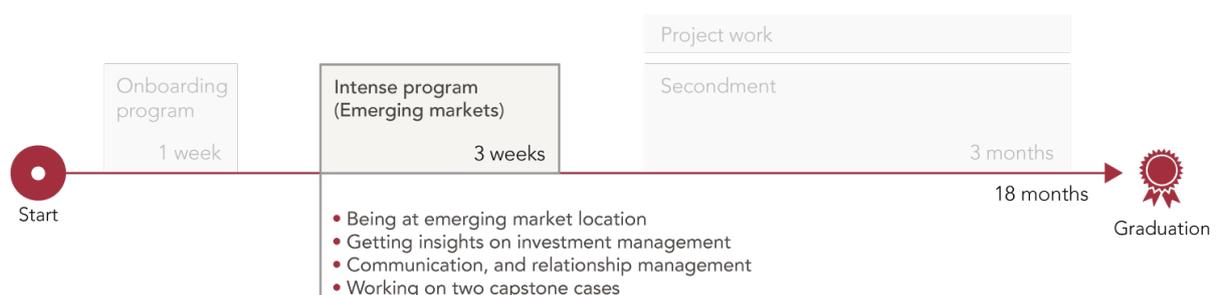


The first onsite training takes place at the training centre within the client’s headquarters. The programme is designed to familiarise the participants with the institutions’ strategy, structure and organisation. Also,

- participants receive training on the principles of personality structures and communication styles, group dynamics, self-management/personal leadership, teamwork, and diversity/intercultural management,
- participants undertake various personal inventory surveys and are asked to start their own individual development plans,
- participants attend a workshop on business etiquette.

Finally, all participants have the opportunity to meet the partners and principals of the wealth management boutique at a historical landmark, where it was established more than 150 years ago. After the initial onsite programme, participants work with designated executive coaches on their individual action plans and prepare for the intensive phase.

B) Intensive Training Phase at an Emerging Market business location



After extensive preparations using our industry-leading e-learning library and conducting various challenging assessments, participants start the 3-week intensive phase of the programme at a location in the APAC region where our client operates.

- Participants are exposed to senior faculty members who are experts in communication and behavioural sciences, investment and finance specialists and business experts.
- The interventions are case-based and allow the participants to interact with each other as much as possible.

- Highlights of the 3-week intensive phase of the programme are two extensive capstone cases. One centres on the strategic development of the wealth management boutique, whereas the other focusses on a complex wealth management client situation. Participants work in teams of 3 and are asked to submit written proposals, as well as present their recommendations and conduct a simulated client conversation. In both presentations, a panel of experts assess the contributions of the participants.

After the Intense programme, participants update their individual development plans and continue their individual work with their executive coaches.

C) Project Phase and Job Assignment



As a next step, participants begin a 3-month secondment in a business area, which is different from their permanent roles. Additionally, they are asked to work on a current business challenge that is being discussed at the management board level. The member of the board personally sponsors the project and tasks the participants with work on the project and remains the main stakeholder.

D) Graduation

After having successfully completed the 3-month secondment and concluded the project work to the satisfaction of the board member, participants attend a graduation ceremony at one of the offices of the client. Graduates of the programme become mentors to future graduates and rising talents who will become participants in the following cycle of the program.