

Accelerating High Performing Mergers and Acquisitions in the Financial Services Industry





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Today's economic climate brings challenges to the financial services industry that are unprecedented in nature. In the current environment, mergers often occur at a lightening fast pace. This heightens the difficulty of managing all of the aspects of the merger smoothly and successfully – especially with keeping your existing and newly acquired employees up-to-date in the skills they need to be productive. The realities of the financial industry today no longer allow for slow, methodically planned integration activities. Never before has there been a greater need for financial institutions to strike the balance between thorough planning and execution and speed and agility in executing mergers and acquisitions.

In the midst of a merger or acquisition, it is more important than ever to remain focused on your customers to fuel organic growth, streamline operations and realize synergies to maximize shareholder value. During a merger or acquisition, your company will most likely encounter challenges related to:

- **The need to quickly integrate cultures and leadership philosophies**
- **Integration and communication of new policies and procedures**
- **Maintaining customer loyalty, satisfaction and confidence**
- **Downsizing at the same time that new employees need to be onboarded and key talent retained**
- **New and more rigorous regulations and compliance issues**
- **Conversion and integration of infrastructure, systems and business processes**



We have experience working with:

- Retail Banking
- Commercial Banking
- Mortgage
- Card Services
- Wealth Management
- Electronic Banking
- Private Client
- Insurance
- Capital Markets
- Information Technology

Benefits of Partnering With TrainingFolks

Partnering with TrainingFolks can help your organization increase the speed and effectiveness of integration activities to keep pace with your mergers and acquisitions. Your organization's capabilities are enhanced through TrainingFolks' Managed Contract Trainer activities. Benefits of partnering with TrainingFolks for your post-merger integration training needs include:

- **Ability to provide seasoned training professionals with deep experience in the Financial Services Industry**
- **Reduction in travel and accommodation expenses**
- **Increased productive time for your employees**
- **Increased employee speed to competency in the post-merger environment**
- **Delivery of consistent policies, procedures and corporate messages**
- **Ability to closely partner with your existing merger integration training team**
- **Flexibility in management of overhead costs**

TrainingFolks' Managed Contract Trainer Service has partnered with some of the world's most successful Financial Services organizations to implement culture change, systems and platform integrations and onboard newly acquired employees.

Why Partner with TrainingFolks for Your Post-Merger or Acquisition Training Needs?

1. We Deliver to Accommodate Your Geographic and Demographic Needs

The strength of the TrainingFolks solution lies in the ability to select contract trainers from locations across North America. This benefits our clients substantially by providing them with financial industry qualified contract trainers close to the location, reducing travel and accommodation expenses. In addition to localized resources, the contract trainer service ensures that each facilitator has a background in adult learning and possesses excellent financial services experience. If you need multi-language capabilities we can provide that too.

"Two big issues for us to rollout our training effectively were that we needed to keep our travel expenses down and credibility of our trainers high. TrainingFolks provided a team of experienced retail banking trainers that were located in our markets, saving us on the travel and the feedback was great on the delivery!"

2. We Centralize Management and Administration

TrainingFolks' goal is to make outsourcing delivery services easy and seamless to your organization. For that reason we focus on managing, monitoring, motivating, and measuring our contract trainers and consultants. Each of our clients is assigned a Resource Manager and Program Coordinator to support the initiative. The Resource Manager works with your organization to select the most qualified professionals and monitors the quality of services delivered over the course of the initiative. The Program coordinator manages the day-to-day activities of the contract team such as scheduling, time tracking, billing, and reporting.

Having a central and single contact point can significantly reduce administrative costs associated with multi-resource engagements.

"Not having to deal with 22 independent trainers individually about travel, expenses, logistics, and getting paid allowed me to focus on other higher priorities!"

3. We Focus on Service Quality

TrainingFolks uses a total quality management approach for producing high value, high quality training. Starting with the recruitment of the right training

professionals for your initiative and ending with review and refinement of delivery, this quality control process ensures that a consistent message is delivered to your employees throughout the post-merger integration period. TrainingFolks' professional trainers will seamlessly integrate into your organizational culture to help ensure a smooth transition.

"My sponsor heard from a team of participants that they couldn't believe the TrainingFolks trainer was not an employee of the bank; she was so prepared and embraced our company values!"

4. We Help Mitigate Risks

Your TrainingFolks partner team utilizes proactive risk management processes and procedures to ensure uninterrupted rollout of your post-merger training initiatives. Our risk management process rests on a solid foundation of thorough communication. Our process ensures that issues with scheduling, cancellations or last minute training content changes are addressed well before they become problems.

"Part of the challenge for our project was the project slide 6 months due to technology issues. This would have added extreme cost and effort to the project had we used other trainers as in the past. Instead TrainingFolks had worked out a contingency plan and based on their recommendations we were able to reduce unnecessary spend!"

5. We Value Genuine Partnership

Our experience has been that most companies want to find a training provider that will truly be a partner – one that knows your business and your unique challenges and needs. TrainingFolks is vested in the same interest. We measure our success by your success. Our desire is to become an integral part of your team by sharing the goal of helping to make the merger or acquisition a complete success.

"TrainingFolks took the time to truly understand our business and the challenges. They worked with us when things changed on the project and customized the services as we needed."

Case Studies

Global Financial Services Organization

An international firm discovered post-merger that over 100 coaching models were being used. TrainingFolks' consultants facilitated training and communications to implement a post-merger shared Coaching Method across the enterprise. This initiative resulted in dramatic cost savings as a result of reduction of process variance. The approach has since been adopted internationally by the entire enterprise and integrated into a multitude of programs and initiatives.

National Banking and Financial Services Organization

A merger of two large national banks with dramatically different leadership cultures demanded that frontline leaders adopt a common competency model, leadership practices and philosophies. TrainingFolks' consultants facilitated post-merger training sessions designed to introduce high potential frontline leaders across the enterprise to a common set of Corporate Values and the Leadership Model resulting in increased speed to post-merger cultural integration.

An International Financial Holding Company

A multi-state banking organization was aggressively growing through acquisition. To support the lead integration and training team, TrainingFolks built a team of trainers who became an extension of the integration efforts. They trained Tellers and Personal Bankers on the new systems and processes, products, as well as customer service and sales skills. The intact team of trainers rolled from state to state delivering the training.

Global Banking and Financial Services Organization

One of the worlds largest diversified financial institutions required a team of professional trainers to roll out a teller and platform curriculum nationally, to complete the integration of its largest acquisition initiative. TrainingFolks provided a team of localized professional trainers to partner with the institution's training organization to complete the rollout ahead of schedule.



About TrainingFolks

TrainingFolks is a full service performance consulting firm. We assist our clients in implementing change and building a higher performing workforce. We rapidly mobilize and manage teams to **Accelerate Mergers and Acquisitions in the Financial Services Industry.**

Contacts

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