

Client: HSBC

Sector: Financial Services

Solution: Driving change from within by creating a global change network to successfully engage over 250,000 employees



HSBC Global change project with local implementation

Headquartered in London, HSBC is one of the world's largest banking and financial services organizations and one of the industry's most valuable brands. Its international network covers 73 countries and territories in five geographical regions: Europe, Asia, Middle East and North Africa, North America and Latin America.

Challenge

HSBC wanted to deliver a one-stop-shop HR information portal for its global staff. They wanted employees to be able to locate the HR information they needed, to obtain consistent information and advice - and for Contact Centres to be set up to give employees relevant advice and support.

For this reason, HSBC decided to implement an ambitious change programme, called HRDirect, that would support the entire HSBC employee population of over 250,000 employees.

Traditionally, HSBC had not followed a formal structure for Change Management, instead they had used large consulting firms or contractors to build and deliver their plans. The project sponsor - Mark Jones, Global Head of HR Service Delivery – realised that for HRDirect to be successful the project needed to be managed utilising internal project teams based around the globe, supported by consistent Change Management language, training, tools and coaching. The belief was that this would lead to much higher levels of employee engagement and user adoption.

"I knew, that if we wanted to be successful, we had to find a way to both engage key change leaders in our global organization and to provide a rigorous Change Management process that would deliver HR Direct."

Mark Jones, Global Head of HR

Solution

Internal surveys showed that HSBC employees felt that traditionally the focus for change was communications driven, using limited channels and a top-down approach. To encompass an end-to-end view the Change Management approach had to be flexible as well as tailored to global and local needs. This was achieved by using the structured Changefirst methodology and tools. HR Direct established a dedicated Change Management work stream, led and owned by HSBC employees.

Changefirst trained a central change team (to guide and coordinate) and a network of change managers in local countries (to tailor the change plans to their local needs). To accommodate the global reach of the project, the change team was expanded, involving and coaching over 400 “change champions” in the business. Their explicit intent was to “translate” the global change plans into tailored, locally-specific change plans and the digital nature of [Changefirst’s Roadmap Pro toolkit](#) made it easy and cost-effective to provide just-in-time skills and tools that change champions needed to be effective.

This created very high energy and commitment levels. The most pivotal tool used in this project was the Change Network Map, which provided a clear view of how change was implemented at different levels, who the influencers were, and how to engage and communicate with different adapter groups.

Early analytics using Changefirst tools*: Adapter Readiness Assessment, Sponsor Assessment and [Initial Legacy Assessment](#) identified 3 key areas of focus. These were:

1. **Commitment** – helping to move stakeholders to build their ownership levels, so they become committed to the new service and are advocating, using and owning it
2. **Sponsorship** – tracking Sponsor behavior and working with Sponsors to generate actions in support of HRDirect
3. **Involvement** – encouraging people to engage openly in the change process.

“What we did was to use the Changefirst digital tools and analytics to focus on key areas of leverage in a complex project. It really helped us focus and to direct our resources to where they would make the most difference. It also helped me have informed discussions with local teams based on actual data”

Sarah Moore, Global Change Lead HR Direct

Results

The transference of the Changefirst approach to the HRDirect community meant that HSBC were not only executing this change in a more sustainable way, but that they would also have the on-going capability to deliver subsequent changes – thus delivering exceptional value for money. This resulted in improved change performance (both quality and productivity) and provided a basis for critical decision-making (e.g. roll-out) and difficult conversations (e.g. sponsor effectiveness).

The approach to communicating HRDirect focused on messages distributed through a variety of channels to target different audiences helping people through the end-to-end change. As well as newsletters and role-based interviews, an HRDirect video was produced. This introduction to HRDirect was visually appealing and was used globally to build brand recognition, and to highlight HSBC's diversity.

The results for HSBC have been tremendous to date. The programme of work is reporting very high engagement levels, with key technical employees - who were a big concern - acting as key advocates for the project. The regional teams felt like they were part of the solution and had ownership of the roll-out in their business units. And, the over-arching approach of providing skills, tools and coaching to internal agents has cascaded down the Organization with real pay-offs in terms of motivation and buy-in to what could have been a very risky program of work.

“This was one of the most successful projects I have led. We built high engagement both centrally and globally and user acceptance rates have been very high. The combination of our team and the capability building of Changefirst proved to be a very powerful cocktail”

Erica Peters, Global Lead HR Customer and Channels Support

*Tools available in [Roadmap Pro](#) – Enterprise Change Management platform as part of a comprehensive suite of 9 powerful and intuitive planning, diagnostic and tracking too

Can we help your organization deliver change more effectively?

If delivering change more effectively in your organization is high on your agenda, then schedule a no-obligation demo of Roadmap Pro now.

[BOOK A FREE DEMO TODAY](#)

Or visit www.changefirst.com for more information.

About Changefirst

Changefirst has been working with organizations for over 25 years with a clear goal - to enable organizations to deliver on their change agenda. In that time, we have worked with over 300 organizations in over 45 countries, training more than 40,000 people to use our tools and processes.

In the last 5 years, the accelerating pace of change and wholesale disruption of business models has seen client requirements changing significantly – with a need for solutions that are cost effective, scalable and available 24/7. To meet those needs we have developed Roadmap Pro for organizations that must deliver their change projects quickly, comprehensively and cost-effectively.

In 2020, Changefirst was assessed and certified as meeting the requirements of ISO 27001:2013 for providing Change Management services.



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