

# Case Study - Man Investments Large Scale, Rapid Cultural Evolution

## Company Environment

Man Investments is a leading global provider of alternative investment products and solutions as well as one of the world's largest futures brokers. With key centres in London, Pfaffikon (Switzerland), Chicago, New York, Hong Kong, Montevideo, Tokyo and Sydney, Man Investments is an innovative and progressive firm. Servicing both retail and institutional investors and creating new investment opportunities, Man Investments is a global leader. Listed on the FTSE with over US\$50 billion under management and having achieved one of the largest fund raisings in history, Man Investments is evolving quickly and purposefully. Their presence in Australia creates a servicing hub for the Asia-pacific region utilising their domestic and international resources.

## Business Challenge

As Man Investments has grown rapidly and as its products and services have become far more diverse, pressure has significantly risen for the executive team continually engage all parts of the business and sustain the spirit of entrepreneurialism which pervades all they do. The challenge for this team was balancing the immediate demands of departments and leaders with the longer term strategic investments required in the increasingly regulated global financial markets. Anticipating the scale of growth, the level of customer interface demanded and internal user sophistication is an incredibly complex and expensive task. The purpose of this organisational change program was to assess existing views and expectations of the global employee base and calibrate these with the strategic needs of the business.

To ensure the alignment process stayed on track a support program of consulting, facilitation and team development was provided.

The Man Investments program had three objectives:

1. To align team expectations regarding possible future demands and how they will support the continued growth of Man Investments
2. To conduct practical sessions educating and engaging all on a common approach towards the opportunities available
3. To engage the leadership team in conversations whereby they consider the ways in which they can proactively engage one another in innovative decision making and prioritising of the projects undertaken

## Evolution in Partnership with Future Platform

The following provides an overview of the Offsite Facilitation process:

1. Future Platform began by establishing an understanding of the strategy and priorities for the group through discussions with executive and senior managers
2. By conducting one-on-one interviews with a broad sample of employees across the group, Future Platform made an assessment of the consistency in expectation for the team regarding specific issues and identified possible barriers to group performance
3. The overall findings from the interviews were discussed with the executive and a series of global offsites were agreed and a consistent set of agenda items were formalised. This included structuring regionally specific issues, celebrating and leveraging existing strengths, key messages and likely outcomes
4. Future Platform then generated the material to ensure the prioritised issues were addressed in a meaningful way during the conferences and in post off site actions. The material from the interviews significantly increased the accuracy and specificity of the agenda

5. Nigel Watts ensured the right forums and environment were created, allowing the team to effectively focus on key issues and generate workable solutions. The combined benefit on business clarity and team development was then be used to enhance results delivery
6. During the offsites and consulting sessions, all discussions were recorded and critical issues were listed for follow up. Nigel ensures a set of key deliverables were developed and delivered immediately after the sessions and later aggregated into broader board papers

#### Business Benefits

The outcomes from such a program are:

1. Strong sense of alignment across the whole business regarding their shared goals and focus
2. Increased and shared leadership confidence to represent the wins and challenges faced
3. Better clarity on critical relationships across the business and a sense of 'account management' applied to their approach
4. Sharper awareness of the ways they can proactively manage the expectations of their internal 'customers'

*"Throughout this program of consulting, facilitation and advisory, Future Platform has created a tremendous sense of positive momentum in Man. Nigel and his team have ensured we are more focused on leveraging our global strengths and increased our cross departmental process and product knowledge. We will continue to gain from, embrace and internalise the process going forward."*

*John Morrison, Global CEO, Man Investments*