

CASE STUDY

Management Training Program



Challenge

A large wealth management firm with multiple locations had over the last year promoted several staff into people management/team management roles and none of these individuals had any prior experience or training on managing people. The organization, whilst large, did not have the resources to train this group internally.



Solution

Pershing's Business Consultant proposed a one day "boot camp" training program to introduce the basics of people and team management to the group of 8 managers. The content consisted of:

- Managing Yourself
- What is the Role of the Manager
 - Cadence of Managerial Duties
- Managing High Performers
- Managing Under Performers
- Motivation
- How to Set Your Team's Vision
- Setting Success Metrics

The content was delivered in lecture format, self-reflection, group reflection, role plays and a panel discussion.

After the event, the Pershing Business Consultant set up monthly "Office Hours" meetings with the group of 8 to discuss lessons learned from the field, putting the content into practice, and diving deeper into managerial skills.

**AS A RESULT, THE WEALTH MANAGEMENT
FIRM INSTITUTED A MORE CONSISTENT
APPROACH TO PERSONNEL MANAGEMENT
AND HAVE SEEN**

**an increase in employee
satisfaction and
productivity**

FROM THEIR TEAMS.

This case study is not intended to guarantee or represent that all firms will achieve the same or similar results.

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