



CULTIVATING A HIGH-PERFORMANCE WORKFORCE (WHEN AND WHERE YOU NEED IT MOST)

How We Helped a Leading Financial Services
Firm Revitalize Marketing Operations and
Ignite Organizational Efficiency

**NORTH
HIGHLAND**



THE SITUATION

One of the nation's largest financial institutions engaged North Highland to deliver an innovative and scalable managed services solution to decrease marketing overhead, reduce risk, and strengthen the existing operating models, talent management processes, and organizational structure. Ultimately, the firm needed a trusted strategic partner to assemble a team of specialized marketing experts, and design and deliver tailor-made solutions, with a focus on cultivating cultural synergy, continued improvement, and unparalleled performance.



OUR VALUE

North Highland's unique blend of financial industry expertise and marketing and sales enablement prowess helped this financial services client successfully optimize high functioning teams to bolster performance and drive sustainable business results. We partnered with the company to predict, prepare, and adapt to impending market disruption and shifting workplace demands.





LANDSCAPE

Power to Your People: The Heartstrings of Your Brand

In their pursuit of operational excellence, financial institutions of all sizes face challenges. While each has distinctive differences, cultural dynamics, and disruptive threats at play, they share one common objective: an unwavering commitment to transforming business impact.

In order to compete effectively, banks must revive business strategies, embrace new operating models, and galvanize resources to swiftly adapt to evolving marketing imperatives—both imminent and on the blurry horizon.

For one of the nation's largest financial institutions, marketing operations was traditionally managed by a team of disparate contractors, which impacted the bank's ability to meet global financial advisor demands and maintain optimal performance, efficiency, and productivity standards. Additionally, they lacked the data-driven insights needed to measure the ROI of campaigns and media purchases.

The financial services giant engaged North Highland to operationalize an innovative and scalable managed services solution to assemble a team of specialized experts, decrease marketing overhead, reduce risk, and effectively reinvigorate existing operations.

The organization's previous staffing partner lacked the understanding needed to provide critical risk assessment and ensure ongoing regulatory compliance.

To be successful, North Highland was tasked with developing a managed services framework that allowed the client to modernize marketing operations, increase business efficiencies, and thrive amidst industry disruption.

In the following, we highlight how our seven-year partnership with the financial services institution integrated a managed services strategy into marketing operations. Going far beyond providing a staffing solution, North Highland serves as a critical extension to the client's team, working hand in hand to cultivate the high functioning talent needed to execute mission-critical marketing events, materials, campaigns, data migrations, platform transformations, and other strategic initiatives that support both marketing operations and the bottom-line.

Today, marketing leaders struggle to keep up with the rapid pace of innovation and capacity demands while balancing budgetary constraints and efficiency standards.

Tomorrow, with help from North Highland, our client will set the gold standard for marketing operations excellence.

We partnered with a leading financial services client to prepare for future operational transformation by:

- Delivering committed specialized resources that perform high-volume operational work in a cost-effective manner (in lieu of disparate contractors), without sacrificing quality.
 - Increasing organizational capacity to manage operational demands and drive strategic business impact.
 - Identifying innovative ways to generate productivity and drive optimization through value-added services.
 - Translating organizational staffing improvements into projected financial impact.
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APPROACH

Expand CAPACITY

At the inception of every new managed services engagement with this financial services leader, we unleash a rapid immersion and active listening campaign to analyze nuanced marketing needs and gauge their resource capacity. We then work to understand intensifying financial advisor demands, budgetary constraints, and industry regulations.

Armed with this intelligence, we create a customized talent recruitment framework to identify the strongest resources for critical marketing initiatives, announcements, reports, and campaigns.

The following grounding exercises serve as the foundation for North Highland's Agile talent assessment:

- **Sourcing and screening.** Partnering with the financial services client to assess their marketing team needs, and recruiting talent with the technical expertise, collaborative mindset, and vision needed to successfully add value in times of peak demand.
 - **Demand management.** Future-casting rapidly approaching resource demands and assigning first responders to proactively block and tackle late-breaking marketing needs and requirements. This "SWAT" mentality took the weight off FTE shoulders, which were already overwhelmed with pressing business priorities, and empowered them to focus on more strategic pursuits.
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APPROACH

Strengthen CAPABILITY

By systematically assessing the current capability gaps and crafting detailed job descriptions to onboard project-ready marketing staff, North Highland quickly gets the right resources in place to improve performance, reduce overhead, decrease risk, and deliver superior-quality results.

The following tools and techniques served as the foundation for our exhaustive expertise analysis at the financial services organization:

- **Onboarding.** We searched the globe for candidates that thrive at the intersection of collaboration, innovation, and excellence—expert strategists, developers, writers, programmers, designers, UX specialists, and data enthusiasts that dream big, push boundaries, and develop bold solutions and bring them to life.
 - **Consistent, high-caliber people.** Once the business imperatives were defined, North Highland assigned resources with the technical skills needed to manage shifting marketing demands quickly and efficiently.
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A man in a dark suit, light blue shirt, and patterned tie is speaking to a group of people in a meeting. He is gesturing with his hands. The background shows a window with a view of trees. The image is partially obscured by a yellow text box.

Fueled by our long-standing reputation for added value, we partner with this financial services client to ensure cost is manageable and output is excellent. Our commitment to quality bolsters employee engagement, camaraderie, and performance at the institution, in a way other staffing partners are unable to replicate.”

ELIZABETH BOYD

Management Consultant
at North Highland

APPROACH

Nurture COMMUNITY

Working in close collaboration with our financial services client, we provide actionable, culture-centric recommendations to bring about new levels of camaraderie and collaboration at the organization.

This was brought to life in three key ways:

- **Service assurance and quality governance.** We provided active quality control coupled with project management oversight to ensure optimal employee engagement and superior performance at all stages of the project delivery journey.
 - **Highland helpers.** Aligned with North Highland's "culture of care" commitment, we ensured resources were properly acclimated to the organizational culture, steeped in their preferred ways of working, and empowered to bring fresh ideas to fruition.
 - **Tools and training.** We provided comprehensive training and coaching to ensure that marketing resources were deeply entrenched in the bank's culture; had a strong understanding of the overarching brand promise, vision, and strategy; and were equipped with both the consulting and technical skills necessary to thrive in a dynamic environment.
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At North Highland, we're committed to cultivating a 'culture of care.' Unlike staff augmentation, we put a strategic lens on managed services, recruiting creative minds that truly believe in the organization's purpose and take pride in their contributions."

MICHAEL SCHLECHTER

New York Market Lead
and Associate Vice President at Sparks Grove
(the Experience Design agency of North Highland)

APPROACH

Deliver VALUE

Over the course of North Highland and the financial service organization's seven-year partnership, we've cultivated an intimate understanding of the bank's strategic priorities and operational processes, which has allowed us to seamlessly transition from strategy to deployment, with continual support and value-added recommendations. This manifested in the following ways:

- **Flawless execution.** Armed with a talented team of 40 multidisciplinary experts equipped to swiftly respond to high-priority requests, we provided consultative guidance and drove the strategic execution of:
 - 500+ internal events annually (e.g., production assistance, financial tracking).
 - 1,500+ specialized marketing materials, which empowered financial advisors to increase their marketing presence, acquire new customers, and reach their goals through distinct offerings.
 - 500+ integrated marketing campaigns, which allowed our client to educate current and prospective clients on their financial services capabilities.

In addition, we partnered to execute mission-critical data migrations, platform transformations, and other strategic initiatives that drove business efficiency.

- **Partnership expansion.** Given North Highland's unique commitment to partnership and results (within budget), our managed services model has expanded from simple sales enablement to virtually every aspect of enterprise marketing operations. This has resulted in an 80 percent staff retention rate, team continuity, and significant time and cost savings for the financial services organization.
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TRUE TO WHO WE ARE

Demonstrating North Highland Differentiation through Managed Services



TRANSFORMING BANKS INTO AGILE CHANGE MAKERS

The power of North Highland's managed services solution for the financial services organization lies in our differentiated approach to operational strategy, agility, design, and delivery.

We empower our client with deep industry expertise, sales and marketing enablement proficiency, and actionable recommendations to inform quality recruiting, resource prioritization, strategic decision-making, and cross-functional collaboration.

We equip them with the tools needed to intimately understand their internal strengths and limitations and ensure that dedicated resources are available to tackle late-breaking marketing demands—on time and within budget.

Ultimately, our work empowered the institution to:

- Shift the marketing operations paradigm from disparate, laborious and expensive, to streamlined, efficient and economical.
 - Design and scale critical operational levers that informed organizational frameworks and measurement strategies.
 - Prioritize mission-critical marketing initiatives and demands that closely align with overarching organizational and industry regulations.
 - Create high-functioning teams that empower the firm to focus on more strategic endeavors while exceeding the high-volume demands of a global workforce.
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PROJECT SPOTLIGHT

CLIENT SITUATION

An international financial services institution's list generation group needed to increase the speed and efficiency of list creation for more than 350 campaigns (including direct mail, e-mail, and phone) to effectively optimize product sales opportunities and sustainable business growth. Their existing processes and systems were manual and customized, and lacked the desired ROI needed to be successful. To combat this issue, our client implemented a new database language structure to simplify the process, but they still needed to transition business as usual processes in the current-state environment, perform the data migration, and run ongoing campaigns in the new environment. Ultimately, they needed an exceptional team of developers, strategists, and analysts to handle this execution.

APPROACH

The firm engaged North Highland to design and execute a phased approach to recruit and onboard qualified candidates with the specialized expertise needed to be successful, define the project rigor and routines, perform the migration, transition from the old vendor, and effectively ensure quality performance, and results.

OUR VALUE

Our partnership defined the vision, strategy, and process to ensure a successful data migration.

ABOUT NORTH HIGHLAND

North Highland makes change happen, helping businesses transform by placing people at the heart of every decision. It's how lasting progress is made. With our blend of workforce, customer and operational expertise, we're the world's leading transformation consultancy. We break new ground today, so tomorrow is easier to navigate.

Founded in 1992, North Highland is an employee-owned firm—regularly named one of the best places to work. We have more than 5,000 consultants worldwide and 65+ offices around the globe. Meanwhile, we're a proud member of Cordence Worldwide (www.cordence.com), an international consulting alliance. For more information, visit northhighland.com and connect with us on [LinkedIn](#), [Twitter](#) and [Facebook](#).

The logo for North Highland features the word "NORTH" in a large, bold, dark blue sans-serif font. A small, light blue triangle is positioned to the left of the letter "N". Below "NORTH" is the word "HIGHLAND" in a smaller, dark blue sans-serif font.

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