

Banking Case Study

At a glance

New Orchard was hired to perform a B360 on a relatively mature, independent bank. The bank felt like the industry was stagnating, providing an opportunity to disrupt, innovate and stand out. They were preparing for a strategic planning session and needed data to understand how much innovation the business could support after getting more conservative feedback the year prior.

Key metrics

The takeaway wasn't that this client needed to fix a myriad of things internally, but that rather, they were healthy enough to implement some more substantial changes and be a little bit more disruptive and innovative without impairing the organization or creating distress.



3.9
Maturity Level



58
Net Capacity Score



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CHALLENGES

- Preparing for 2023 strategic planning
- The C-Suite wants to be disruptive, but leans more traditional in their decision making
- There was trepidation around starting new initiatives following a consulting engagement in the past and lack of adaptability data

SOLUTIONS

With 2023 fast approaching, we focused on arming their C-Suite for strategic planning. We facilitated a Business 360 with the leadership team so they could have current state data on three key categories:

Business Identity



How do you make decisions

Change Capacity



How adaptable is your company

Operational Maturity



How mature are your processes

FINDINGS

Misaligned Decisions in the C-Suite

1

Business Identity showed some interesting gaps in their perspective, specifically the allocation of risk. The CEO and COO saw the business as more innovating, while the rest of the organization was aligned around trying to compete within their industry.

Extremely Adaptable Organization

2

Change Capacity proved this bank to be the healthiest organization we've assessed across any industry. We looked at a lot of different areas of opportunities from tenure, gender, work environment (onsite, remote, hybrid) looking for areas to approve. Their Net Capacity Score was the highest we've seen. We did uncover Collaboration as an area for improvement.

Validation to Step On The Gas

3

After being told they were changing too much too soon, leadership had dialed back innovation and change initiatives over the past year, but our OMI data showed they can actually step on the gas - the organization is going to be fine. It gave them confidence to be able to generate change, innovation, and disruption.