Chapter 48

Changing and Improving Behavior in Management and Team Meetings:
A Case History From the Portuguese Banking Sector

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ABSTRACT

This case history critically reflects upon the implementation of an OCD initiative designed to improve the efficiency and productivity of management meetings and team meetings within one part of a large multinational financial bank situated in Portugal. It describes why the initial change strategy failed, and how a subsequent evidence-based approach to change agency practice helped bring about more effectively the desired improvements in the behavior and performance of managers and staff when attending meetings.

INTRODUCTION

In this reflective case history we critically reflect upon the implementation of an OCD initiative designed to improve the efficiency and productivity of management meetings and team meetings within one part of a large multinational financial bank situated in Portugal where one of us is a departmental manager. We will first provide some general background detail regarding Financial Services including the banking sector as well as the specific organizational context and communication situation that triggered the need for organizational change. This is followed by a description and critical evaluation of the initial and subsequent change strategies for change that were adopted, and the way they were implemented

as perceived and judged from an EBOCD perspective. This includes a discussion of those parts of the change strategies that worked well in accordance with what had been planned and expected, and those that did not. We close the case history with several insights and lessons about EBOCD that might be of relevance, interest and use to managers and HR professionals in other financial institutions.

Background to the Organization and Change Situation

Organizations within Financial Services, including the Banking Sector or even Insurance Sector, are usually very demanding regarding processes and procedures. The importance of compliance within such organizations, and the focus on correct application of all guidelines and implementation of processes are visible all over, and they extend across all organizations. The correctness of each procedure executed by no matter who, or no matter where he or she is within the organization, is a must. Consequently, lots of people are called to participate in meetings because lots of concerns exist regarding each topic.

Having said that and as a resumé, due to the importance of being compliant and the need to do everything as described in those rules or guidelines, large numbers of people are continuously being called to meetings, so called 'preparation meetings', to make them aware of the tasks they need to do and or procedures they need to implement.

Sometimes this leads to a lack of communication between organizational sectors, departments, managers, or employees. The existence of too many guidelines, regulations, roles, processes, and of course procedures to take care of and be aware of, puts people in second place. Another typical associated characteristic of such organizations relates to the quality of meetings which generally can be quite poor. Sometimes there are too many people called to attend, too many opinions expressed, too much discussion, and too few conclusions and decisions which lead to poorly performing and relatively ineffective and unproductive meetings. The problem is not only a question of poor communication, but also a question of poor control, poor problem-solving, poor time management, poor team leadership, and particularly a question of poor chairing of meetings

These typical characteristics of Banking Sector organizations were manifest within a private multinational banking company belonging to an international group that is more than 100 years old, which we refer to as the "bank" (name withheld for ethical reasons and confidentiality). As a multinational company a lot of supervision, regulations, guidance, rules and procedures are in place. The "bank" has branches in Portugal, one of which is situated in the surrounds of Lisbon, employs about 100 employees, is registered as a private company under the main company's code to do banking business, and is the organizational focus of this reflective case history.

A Head of Department (HoD) in this Lisbon branch, who is one of us, became increasingly concerned about the quality of communication and decision making in the multiple meetings he had to attend. Typically, these meetings were scheduled one after another, and typically huge numbers of participants attended. To arrive at some conclusions, or solutions to problems and to get concrete decisions was arduous and often impossible to achieve. In some instances the decisions that were made were proved to be not effective as desired.

Furthermore, the HoD had noticed in his own team meetings that something could and should be improved. Reflecting upon the fact that people are the most valuable assets of a company and taking into consideration that people with the correct level of information should bring better results on task, on behavior, and of course on productivity and performance, he concluded that something should be done. This reflective case history is about this problematic aspect of the communication situation within the "bank" that was now of increasing concern to him.

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