

Case Study

Moving to a strategic internal communication function in UBS Wealth Management

(Case study published in full in "Public Relations Handbook" 3rd edition 2009)

The wealth management business of UBS wanted to deepen client relationships based on communicating a new brand promise: "You and Us." Workwise Communication helped them to develop their internal communications department to provide a centralized, global communicator network. Most of the internal communications specialists were hired for specific technical skills such as writers for print publications and project managers to coordinate discrete initiatives. UBS needed to have a function that was more strategic evolving from being "order takers" to business partners.

Training program approach

There was a three stage approach to the internal communication development program. Firstly, the pre work stage, participants were sent relevant best practice case studies and asked to consider three questions. A conference call was held each week where participants discussed their responses and learnings. The next stage was a two day development workshop and this was followed by telephone coaching for individuals undertaking new and challenging projects. We also worked with the team to develop an internal communication toolkit.

The development workshop

The development program used covered four aspects.

1. UBS business strategy – to ensure the communicators had a fuller context to the changes and their role
2. Internal communication strategy and change management models
3. Consulting skills – participants completed our questionnaire to identify their preferred consulting styles and how they could use different styles with business partners.
4. Case study learning – we developed a set of case studies relevant to challenges faced by the bank and the team.

New organizational structure for the internal communication team

To reinforce learning back in the workplace, participants initiated action plans and assigned projects. Initial evaluation showed that they felt more confident in their new roles and that individual coaching played a key role in launching new initiatives. A relationship manager role was introduced for the more senior communication team members, with responsibility for one to two functional areas.

Supporting a leadership visibility program

A senior leadership visibility program was established with the senior team running more meetings and traveling to other sites. The communications team aimed to "make it easy" for the leaders by providing core communication material for events such as town hall meetings. The relationship manager encouraged the use of one-to-one and one-to-few communications with streamlined internal messaging, rather than mass communication. Managers focused on audience segmentation with their business partners to identify the correct target audiences.