

# A new commercial model...



## Client need

Shifting to become a formalized financial institution, **a commercial bank in Mexico** began to increase its offerings. Adding a deposit service to its existing loan business, the company's headcount doubled. As a result, the organization recognized that it needed to **define a new management model for its people**. The bank set out to create alignment, gain buy-in around the new structure and ways of working, as well as develop its people's leadership skills.



## The solution...

In order to successfully transition to a new model, the bank partnered with BTS to co-create a solution that would...

- **Provide a systematic model for the day-to-day activities** of each role (three levels of Regional Managers, Branch Managers, and Account Executives) both for the credit and deposits sides
- **Create alignment and gain buy-in** around the new structure and ways of working as well as develop leadership skills
- **Develop a tool** to allow Regional Managers to train the new Loans and Deposits Leaders



## Results

**21%**  
increase in bank deposits...

**16%**  
increase in loans...

All branches that experienced the initial BTS program achieved stronger growth in new accounts and income

The success of the initial program led to company-wide rollout in the 1,700 remaining branches