



A City & Guilds Group Business



ST. JAMES'S PLACE  
WEALTH MANAGEMENT

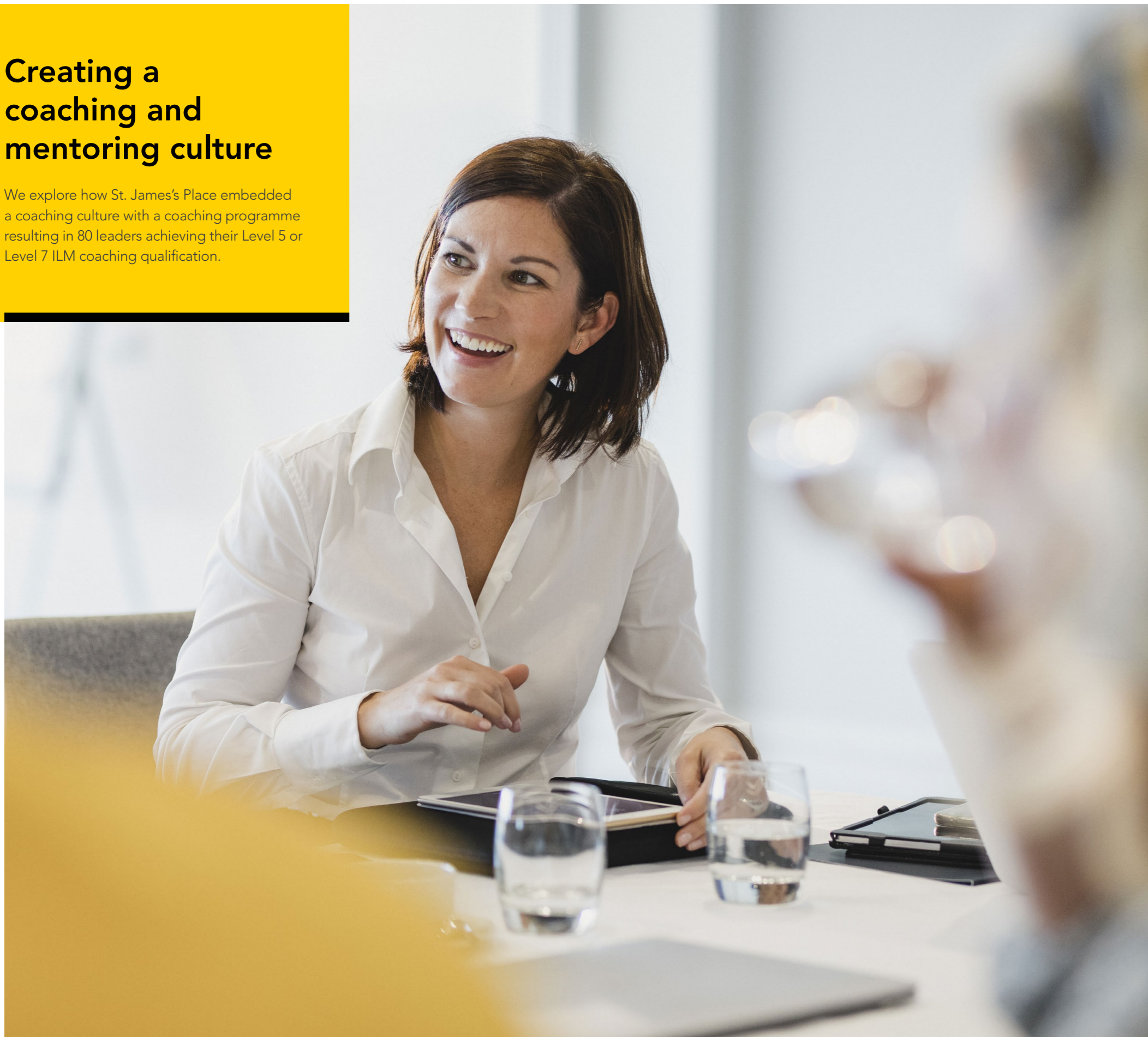


## Creating a coaching and mentoring culture at St. James's Place Wealth Management

St James's Place Wealth Management (SJP) provides regulated financial advice to three quarters of a million clients in the UK, through a network of Partners and Financial Advisors. The SJP model is all about building relationships. Partners and their advisors develop deep personal relationships with their clients. These Partners are in turn supported by a group of Partner Development Managers (PDMs). Their role is to support Partners to grow their businesses, assure compliance and to develop Partners individually.

## Creating a coaching and mentoring culture

We explore how St. James's Place embedded a coaching culture with a coaching programme resulting in 80 leaders achieving their Level 5 or Level 7 ILM coaching qualification.



## Challenge

**St. James's Place wanted to create a coaching and mentoring culture and get high impact behavioural change to stick across a diverse group of experienced managers and leaders.**

Training provider, Arema, had previously worked with a talented group of managers at St. James's Place Wealth (SJP) to build an advanced coaching and mentoring competency, in support of an identified key development need across one area of the business.

As word got around the business, more managers were trained and accredited. Building on that success, SJP wanted to raise the ambition levels across the business to create a true coaching culture.

Many of these managers had attended coaching courses in the past, but few had actually used the skills that they developed.

## Change needs role models

When the training was first run, ILM accreditation was optional and not really role modelled by senior leadership. Only 12% took the accreditation. However, when the London and South East executive leadership got behind the programme, completed it themselves and role modelled it, things really shifted. They showed a willingness to be vulnerable and learn to be better coaches in practice, alongside adding it to the personal development goals for every manager in the business, the graduation rates shot up.

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**We consider coaching a fundamental skill for the whole of our management team, development managers and the leadership team too. Coaching is not just a shared skill; instead, a means to a constant conversation, mutual understanding and team performance.**

”

Ryan McDonald, Director,  
London and South East, SJP

## Solution

### A powerful learning and accreditation journey combining theory and practice

ILM is the gold standard for coaching and mentoring best practice and is the only awarding organisation in the UK that combines the practical application of professional competency with the rigour of regulated qualifications.



Over 90% of leaders say that great coaching and mentoring skills are the most critical capabilities in today's world. Yet only 5% of the UK leadership population have any accreditation-based training in such a complex and EQ rich skill.

The course delivered by Arema for SJP, works towards learners achieving an ILM vocational qualification, which maximises learning value and has a long-lasting impact. It also gives people a goal to work to and a greater sense of achievement, meaning they are more likely to invest time and energy into the course.

Using the ILM programme, Arema teaches people to understand what it means to sit and coach someone and how to be present in a position which is conscious and neutral. In this sense, coaching is a vehicle to transform the personal development relationship that an employee has with their manager. The relationship ceases to be transactional and becomes a leadership relationship. In reality this can be tough for leaders.

“The ILM accreditation process is about learn, do, modify, prove, show. It is about the deployed use of coaching and mentoring in everyday work. Secondly, the ILM indicative content is robust, current, well-informed, and well-aligned but also allows shapes and nuances to adjust. It is wise, realistic, practical and where modern leadership is today.”

Andy Maggs, Managing Director and Lead Coach,  
Arema Training

### The importance of a qualification

Hitting ILM I Level 5 gave the PDMs a huge amount of credibility, especially with Partners. Partners are very successful business owners in their own right and it is a huge benefit to the relationship when PDMs can show they're a qualified coach, it gives even more value to the relationship.

### Making learning bite-sized

The programme delivered by Arema usually consists of over 54 hours of quality guided learning, and awards leaders with the ILM Level 5 or 7 certification or diploma in effective coaching and mentoring, within the organisational context. The learning is broken down into bite-sized experiences - with focused world class input, learning practice, observed feedback and applied learning assignments.

The key difference with this style of coaching and mentoring training is that the theory is not just taught, but it is embedded through a sustained period of doing and being a coach.

Monthly ILM tutorial sessions followed closely after each masterclass for the group, to support peer accountability and learning. This resulted in an average 'immediate' return on investment of 3000%, alongside many enormously proud graduating learners.

## Creating Champions

Arema also established peer supervisors (previous ILM graduates) to support with each group taking the course.

"It works wonderfully well with many saying that short 2-hour sessions focusing on one element of coaching has given delegates the knowledge and then allows practice to take place. It also allows many to reflect and relate the content to what they are delivering on a day to day basis. I truly believe this format allows for more diverse attendance and greater knowledge transfer and embedding."

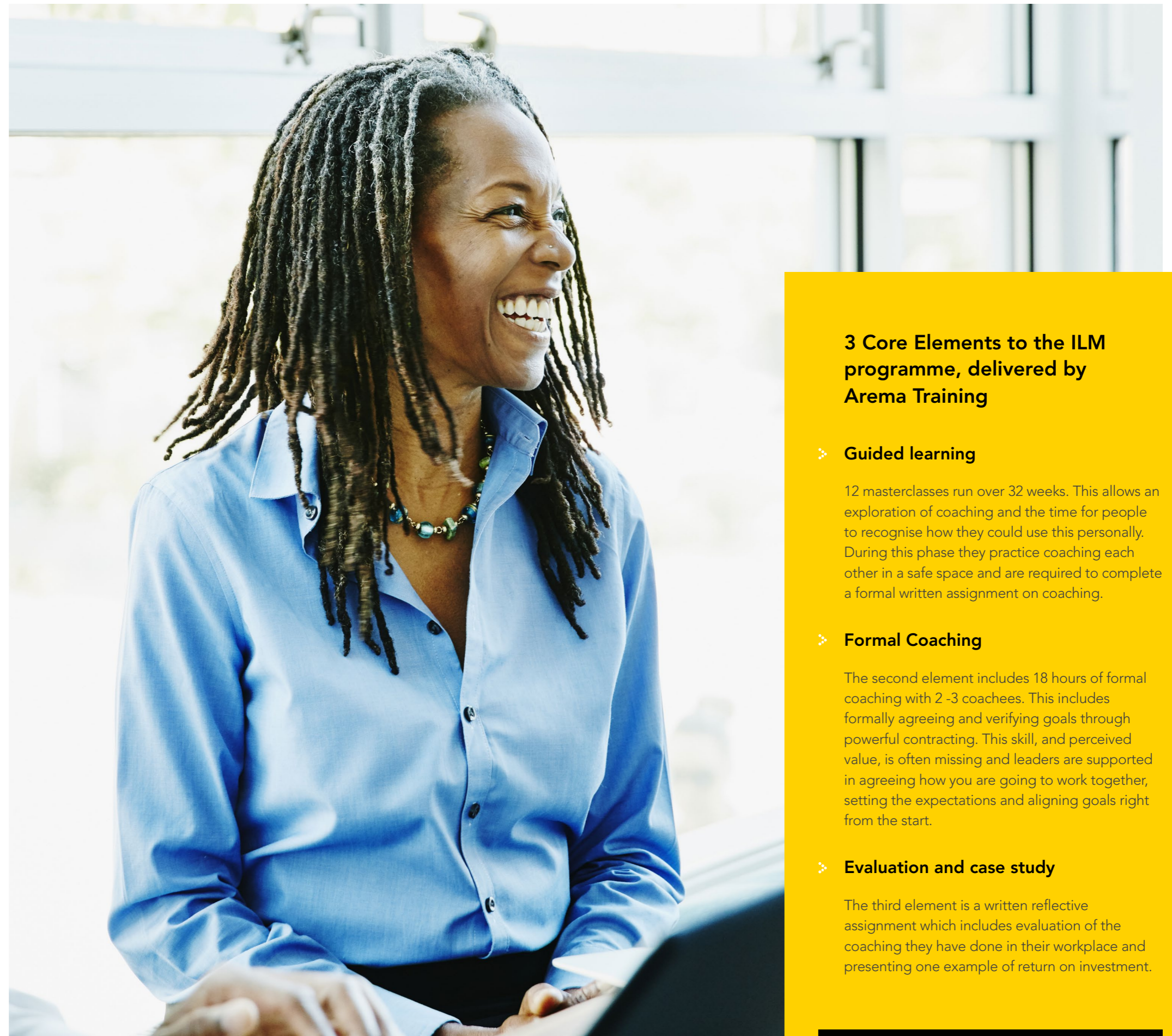
Tracey Smart  
Head of People Development

## Teamwork and impactful relationships

Relationship management is the most fundamental skill for these leaders, and through the training they learnt the importance of listening and asking the right questions.

It has created a leadership community; the best team building is to learn a skill together. The course has had a massive effect on teamwork within this group but has also created a real team spirit within the organisation.

There is no shortage of research which supports that effective coaching enables personal growth both for the coach and coachee alike. Self-management has improved within the group as has self-awareness and awareness of others.



## 3 Core Elements to the ILM programme, delivered by Arema Training

### ❖ Guided learning

12 masterclasses run over 32 weeks. This allows an exploration of coaching and the time for people to recognise how they could use this personally. During this phase they practice coaching each other in a safe space and are required to complete a formal written assignment on coaching.

### ❖ Formal Coaching

The second element includes 18 hours of formal coaching with 2-3 coachees. This includes formally agreeing and verifying goals through powerful contracting. This skill, and perceived value, is often missing and leaders are supported in agreeing how you are going to work together, setting the expectations and aligning goals right from the start.

### ❖ Evaluation and case study

The third element is a written reflective assignment which includes evaluation of the coaching they have done in their workplace and presenting one example of return on investment.



## Results

### A transformational journey and over 3000% ROI

Arema delivered more than just a coaching programme, they realigned the culture and leadership style of the business.

The programme engaged and inspired people, increased performance and ultimately maximised productivity, which for SJP is the number one priority.

Leaders learnt how to also be a coach and mentor too, so that those leaders gave their teams the time and attention they needed. They listened and helped those they worked with to develop solutions and pointed them in the right direction. It built connections and strengthened relationships, which increased trust and resilience within the business.

It had far reaching benefits across the business that supports many of the key development themes for PDMs:

1. Personal effectiveness
2. Impactful relationships
3. Listening and influencing skills
4. Enacted coaching capability
5. Maximizing performance impact

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**What made the biggest difference? Setting a goal that all the leaders will have an ILM Level 5, I have never experienced that before. That's every single leader [in London and South East] that will have ILM Level 5.**

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Andy Maggs, Managing Director and Lead Coach, Arema Training



**For more information**  
visit [i-l-m.com/coaching](https://i-l-m.com/coaching)

## Summary

### The journey so far

It has built connections and strengthened relationships and as we adopt a more digital way of working, the programme provides a way to connect and collaborate in a virtual world.



### A positive impact on working life

One leader was a complete sceptic about coaching, yet after having undergone the process it changed his working life completely.

"I was a real sceptic when I started the course, I'd done coaching classes before, there were some great ideas, but I just didn't use what I learnt at all. This course was different, what this course did was get people doing. You were encouraged to try these things out, carry out live coaching. There was no escape from putting it in to action, as you were working towards a qualification. It was truly enlightening. And the results were amazing."

Eddie Clark, Partner Development Manager

### How to sustain this new culture

A coaching champions' network was set up within SJP and these leaders now work together, regularly meeting to discuss issues, support each other and to continue to learn from one another. These coaching champions allow the culture to take on a self-sustaining life of its own once the formal training has ended. Some of these champions have even decided to go further and gain a qualification in coaching ILM Level 7.

### Proud to showcase ILM qualification

After each leader completed their programme they received a digital credential, allowing them to share their success and achievement online.

"A fundamental skill that the course taught the team is to actively listen. Seeing the power of listening first and asking the right questions and how it enhances your ability to develop someone's motivation, was enormous. It has brought a real depth of quality to the relationships we have with Partners and it directly impacts our effectiveness."

Oliver Stokes MBE,  
Head of People Development, London & South East Hub, SJP

"Having the ILM Level 5 provided a tangible reflection of my skills and it is something that I can carry with me wherever I go. It gave me confidence in my ability and I saw better results than I had in the past - it made me a better manager."

Sean Scannell, Development Manager,  
St. James's Place Wealth Management

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