

From Strategy to Action: How BMO Turned Growth Priorities Into Leader Commitments



COMPANY OVERVIEW

- **Industry:**
Banking and financial services
- **Scale:**
54,000 employees
- **Audience:**
350 senior bank leaders, including branch managers and integration office employees
- **Scope:**
Growth strategy activation across the U.S. operations
- **Region:**
United States

"This was the most energized and focused growth conversation we've had. It pushed us to think bigger and act bolder."

THE CHALLENGE:

The CEO's growth targets were clear: acquire new customers, deepen relationships, expand share of wallet, reduce attrition. Three hundred and fifty senior leaders understood the mandate. The problem emerged in translation. Between the clarity at the top and what actually happened at the leader level, where good intentions competed with daily operations and rarely won.

THE SOLUTION

- Designed and delivered a highly interactive workshop for 350 senior bank leaders, structured around the specific growth priorities the CEO had defined.
- Created cross-functional collaboration sessions where leaders surfaced ideas, challenged assumptions, and co-created growth plans rather than receiving them.
- Focused work on four concrete growth levers: new customer acquisition, early tenure growth, lifecycle deepening, and attrition management.
- Built personal commitment processes into the session so leaders left with specific actions tied to their daily work, not just shared insights.
- Connected branch-level execution to enterprise strategy so leaders could see where their individual choices drove bank-wide performance.

THE RESULTS:

- 75% of participating leaders believed the ideas generated would positively impact bank performance.
- 350 senior leaders produced new, actionable growth plans during the session itself.
- Leaders identified and committed to personal implementation steps before leaving the room.

KEY METRICS:

- 350 senior bank leaders participated.
- 75% of participants believed the ideas would positively impact bank performance
- Leaders across branch and integration functions committed to specific personal actions during the session