

# Nine Months. Sixty People. A 21-Point NPS Gain.

*How a financial institution’s internal management group used adaptability science to rebuild stakeholder trust – and measure every step.*

INDUSTRY	ORG SIZE	DURATION	SCOPE	CLIENT
Financial Services	225+ professionals	Multi-phase, 2020–2025	225 then 60 staff	<b>A major U.S. financial institution</b>

## EXECUTIVE SUMMARY

*The Financial Management group of a major U.S. financial institution recognised a gap between how they were perceived and the strategic partner they wanted to be. Over a multi-phase engagement led by The Renegade Leader Coaching & Consulting Group – an AQai Certified Partner – using AQme individual reports, AQteam assessments, and a science-based customer service survey, the group drove a 70-point NPS improvement across the full engagement. Phase 1 alone produced a verified 162% ROI in 90 days. The final phase produced a 21.8-point gain in under nine months and a measurable shift in how the institution’s internal clients experience and rely on FM.*

## ABOUT THE CLIENT

The Financial Management (FM) group is a division within a major U.S. financial institution, overseeing procurement, financial planning, supplier diversity, and vendor management. Serving as an internal function to departments across the organisation, FM’s effectiveness is measured not just by technical accuracy but by the quality of its partnerships with the people it serves. Leadership recognised that closing the gap between FM’s current standing and its potential as a trusted internal resource required a deliberate, evidence-based investment in how the team understood and applied adaptability.

## SITUATION

In 2020, FM conducted a structured internal customer survey that surfaced a clear picture of where the group stood. General satisfaction was at 68%, the NPS was -31.3, and nearly 44% of internal clients were classified as detractors. The preference to consult with FM voluntarily was below 50%.

Rather than treating this as a performance failure, FM leadership used the data as a starting point. Client interviews identified four consistent themes that the group committed to address:

- Understand our specific business needs and goals
- Clarify roles and responsibilities
- Build accountability around agreed timelines
- Help us be strategic – anticipate future trends and support better decisions

These themes became the foundation of a multi-phase development programme designed to close the gap between where FM was and where it wanted to be.

## IMPLICATION

The survey data made the opportunity concrete. With nearly 44% of clients as detractors and voluntary engagement below 50%, FM had significant room to increase its impact across the organisation. Left unaddressed, the gap would continue to limit FM's ability to contribute strategically – reducing its influence on decisions where financial oversight mattered most. The data provided both the mandate and the baseline for a structured, measurable response.

## APPROACH

The Renegade Leader Coaching & Consulting Group, operating as an AQai Certified Partner, designed and led a multi-phase program using AQme individual reports, AQteam assessments, and a science-based customer service survey. Micro-learnings delivered by The Renegade Leader throughout the engagement kept development active between formal sessions, building capability over time rather than relying on single-event training.

### Phase 1 – Foundation (2020–2021)

The engagement began with structured customer and employee interviews that confirmed and deepened the survey themes. Three targeted programs followed: Change leadership assessment and training built the team's capacity to navigate change with greater confidence; "Creating Win-Win Conversations" developed the collaborative skills clients had requested; and Action Focus Teams were established in Procurement, Supplier Diversity, and Vendor Management. By the end of this phase, NPS had moved from -31.3 to 0.0 – a 31-point gain. This phase also produced a verified 162% ROI in 90 days, with validated cost savings confirmed independently.

### Phase 2 – Broad AQ<sup>®</sup> Deployment (2022–2023)

The AQ<sup>®</sup> Adaptability Assessment was deployed across 225 FM professionals, establishing a shared language for adaptability across the group. Between formal phases, NPS continued to grow from 0.0 to 16.7 – evidence that Phase 1 capabilities had been internalized by the team and were actively shaping how FM showed up for its clients.

### Phase 3 – AQ<sup>®</sup> Intensive with the Core 60 (under 9 months, 2024–2025)

The final phase focused on 60 professionals across six teams. The AQ<sup>®</sup> Adaptability Assessment was redeployed using AQme individual reports and AQteam reports, providing a longitudinal view of how adaptability had developed since 2022. A retake of the science-based customer service survey ran in parallel, linking AQ<sup>®</sup> data to measurable client-facing outcomes. Seven structured two-hour sessions per team – supported by micro-learnings between sessions – translated AQ<sup>®</sup> insight into executable plans using the Stellar Agile Canvas Design. Targeted communication training addressed the specific behaviors clients had named: clarifying questions, reframing challenges, and demonstrating the accountability and forward-thinking partnership the organization expected. An executive debrief cycle embedded the results at the leadership level. NPS moved from 16.7 to 38.5 in under nine months.

**ENGAGEMENT AT A GLANCE**

The Renegade Leader Coaching & Consulting Group, operating as an AQai Certified Partner, deployed two assessment cycles (2021 and 2024), providing a longitudinal view of adaptability development across the FM group. A science-based customer service survey supplemented the AQme individual reports, connecting adaptability data to client-facing behaviours. Micro-learnings delivered by The Renegade Leader throughout the engagement kept development active between formal sessions.

**KEY METRICS**

- 225** Phase 2 participants
- 60** Phase 3 participants
- <9 mo.** Final phase duration
- 2** AQ® assessment cycles

**RESULTS**

Each phase of the programme produced documented, measurable improvement. The NPS progression below reflects a team that invested consistently in growth – and measured the results at every stage.

YEAR	NPS	PHASE	WHAT DROVE IT
2020	-31.3	Baseline	Customer survey surfaced key themes; FM committed to address them
2021	0.0	Phase 1 post	Change leadership training + Win-Win Conversations + Action Focus Teams
2022–2023	16.7	Phase 2	AQ® Adaptability Assessment deployed across 225 FM professionals
2025	38.5	Phase 3 post	AQme + AQteam + science-based survey retake + micro-learnings (<9 mo.)

**Phase 1 Outcomes (2020–2021)**

- NPS moved from -31.3 to 0.0 – a 31-point gain
- Verified 162% ROI in 90 days, with validated cost savings confirmed independently

**Phase 3 Outcomes (under 9 months, 2024–2025)**

- NPS improved from 16.7 to 38.5 – a 131% gain
- Detractors reduced from 26.7% to 11.5%
- Promoters increased from 43.3% to 50%
- Customer satisfaction rose 54%; neutral sentiment fell 77%
- Strong preference to consult FM increased from 60% to 84%

**Full Engagement Outcomes (2020–2025)**

- NPS improved 70 points in total, from -31.3 to 38.5
- Strong preference to consult FM more than doubled, from 41% to 84%
- Detractors fell from 43.8% to 11.5%; Promoters rose fourfold, from 12.5% to 50%
- 82.8% of final survey respondents were repeat participants, confirming the change is sustained rather than survey-driven

### What the Client Said

*“The AQ® framework gave us a shared language for something we had always felt but never been able to measure – and that gave us the tools to show up differently for our internal clients.”*

– Senior Leader, Financial Management Group

### ABOUT AQAI®

AQai® is a science-backed platform for measuring and developing adaptability. Our assessments – including the AQme individual report and AQteam report – help leaders and teams understand and grow their capacity to adapt, so organisations can build the internal capability needed to thrive through change.

**AQai**®

ADAPTABILITY ASSESSMENTS

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