

INDUSTRY	ORG SIZE	DURATION	SCOPE	A major U.S. financial institution
Financial Services	225+ professionals	Multi-phase, 2020–2025	225 then 60 staff	Financial Services · United States

# 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.*

## SITUATION

In 2020, the Financial Management group of a major U.S. financial institution surveyed its internal clients and found an NPS of -31.3, with nearly 44% classified as detractors. Rather than treating this as a problem to manage, FM leadership used it as a mandate: a clear baseline from which to build. Client interviews identified four themes the group committed to address – deeper understanding of client needs, clearer roles, greater accountability, and more strategic partnership.

## IMPLICATION

With voluntary engagement below 50% and nearly half of clients as detractors, FM had measurable room to increase its contribution across the organization. The survey data provided both the evidence and the starting point for a structured, multi-phase investment in capability.

## APPROACH

The Renegade Leader Coaching & Consulting Group, operating as an AQai Certified Partner, led a multi-phase program using AQme individual reports, AQteam assessments, and a science-based customer service survey. Micro-learnings supported development between formal sessions throughout. Phase 1 (2020–2021) included change leadership training, Win-Win Conversations, and Action Focus Teams – moving NPS from -31.3 to 0.0, with a verified 162% ROI in 90 days. Phase 2 (2022–2023) deployed the AQ® Adaptability Assessment across 225 FM professionals. Phase 3 (under 9 months, 2024–2025) focused on 60 professionals across six teams using AQme and AQteam reports, a retake of the science-based customer service survey, Stellar Agile Canvas Design sessions, and targeted communication work – producing the largest NPS gain of the engagement, to 38.5.

## RESULTS

### Phase 1 (2020–2021):

- **NPS: -31.3 → 0.0** a 31-point gain
- **162% ROI in 90 days**, validated cost savings

### Phase 3 (under 9 months, 2024–2025):

- **NPS: 16.7 → 38.5**, a 131% improvement
- **Detractors: 26.7% → 11.5%**
- **Promoters: 43.3% → 50%**
- **Customer satisfaction** +54%

### Full engagement (2020–2025):

- **NPS total: +70 points** (-31.3 → 38.5)
- **Preference to consult FM: 41% → 84%**



*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