

Building an Inclusive Financial Culture through Value-Based Learning and Development

This case study details the development of a culture and value-based digital learning module for a leading financial services group based in Europe. The training program was initiated in response to the company's rapid global expansion, which brought a highly diverse workforce. The program aimed to align all employees with the company's core values, promote inclusive behaviors, and foster a unified workplace culture across geographies. Unlike typical compliance training, this course focused on establishing a deeper, values-driven connection between employees' day-to-day behavior and the organization's culture.

Culture and Values-Based Training

Financial Services



Project Overview

A prominent financial services group based in Europe experienced rapid global growth. This expansion brought a workforce that was increasingly diverse in culture, background, ethnicity, and ways of working. With teams now operating across various regions, the company observed inconsistencies in the understanding and adoption of its workplace culture. While the organization prided itself on its strong values and inclusive principles, misunderstandings around workplace norms occasionally led to a lack of productivity. In response, the organization launched a mandatory culture training program designed for its global workforce.

The goal was to reinforce shared values, promote inclusive behaviors, and establish a unified cultural foundation across all teams. This initiative aimed to go beyond compliance training, instead building a genuine connection between the company's core values and employees' day-to-day actions.

Objectives

- To reinforce shared company values across a globally distributed workforce.
- To promote inclusive behaviors and cultural sensitivity in everyday work scenarios.
- To unify cultural understanding and expectations across all regions and teams.
- To move beyond compliance and foster a meaningful connection between values and behavior.

Challenges

- The company's rapid expansion introduced a wide range of perspectives and cultural norms, making alignment more difficult.
- Misunderstandings around expected workplace behavior sometimes resulted in conflicts or unintentional incidents.
- Adoption of cultural values and behaviors varied significantly between teams and locations.
- There was a need to establish a common set of expectations and reinforce consistent, value-driven behavior at scale.

Solutions Offered

To address these challenges, the company developed an immersive, story-based training program using a "day in the life" format. This approach allowed employees to engage with realistic workplace scenarios that demonstrated how cultural misunderstandings and unconscious bias could occur in everyday settings.

Each scenario was followed by guided reflection prompts and a structured debrief, helping learners explore how their own behaviors align with company values. The training emphasized awareness, empathy, and inclusivity, while providing clear, actionable guidance on expected conduct across roles and regions.

This format helped foster deeper engagement and made abstract values more tangible through practical, emotionally resonant examples.

Outcomes

- Employees developed a stronger understanding of how the company's core values translate into everyday workplace behavior.
 - Learners found the training relatable and impactful due to the realistic and reflective nature of the scenarios.
 - The program provided clear, consistent direction on cultural expectations, which unified conduct standards across the global workforce.
- Overall, the training fostered a more inclusive and aligned workplace culture, supporting the company's ongoing growth and diversity.