



isolutions

LGT

«The collaboration with isolutions has always been very cooperative and constructive. For me, this is the basis for having open and goal-oriented discussions at eye level at all times. In today's fast-moving world, this is essential in order to be able to react pragmatically and agilely to the constantly increasing technological developments. We no longer see isolutions as external consultants, but as part of our Digital Workplace team.»

Peter Matt, Head of Digital Workplace

LGT, founded in Liechtenstein in 1921, is a leading international private bank with over CHF 305.8 billion in client assets under management. LGT acts according to the principles of respect, friendliness and entrepreneurial commitment. As a family-run private bank, they are particularly attractive to clients who value reliability and trust. In addition, their innovative strength and exclusive investment opportunities make them an excellent choice for entrepreneurs and active investors. With 5'000 employees in around 25 locations worldwide, they are continuously committed to achieving their clients financial goals and ensuring long-term success. In 2023, they generated a consolidated profit of CHF 223.6 million.



Thanks to the introduction of the modern working environment on Microsoft 365 and the implemented change management, LGT Financial Services benefits from greater efficiency, stronger collaboration and improved knowledge management for over 5'000 employees at more than 25 locations. The comprehensive change management process has massively increased user acceptance of the tools and their seamless integration into everyday working life. Furthermore, the pilot phase with Microsoft 365 Copilot is already showing initial success. This clearly demonstrates how generative AI supports employees and frees up value-adding working time.

Initial situation

Digitalization is part of LGT Private Banking's four strategic goals to become one of the leading personal and digital private banks, combining the best of the digital and analog worlds. The «Digital Workplace» (DWP) is a prerequisite for achieving digitalization. The goal of creating a digital workplace and making it available to 5'000 employees worldwide so that the full potential of modern collaboration can be exploited is to be unlocked with Microsoft 365. The aim was to strengthen the digital skills of the workforce, optimize collaboration and create a solid foundation for future success. Continuous change

management was crucial to ensure adaptations and further development. The introduction of an agile working model was another challenge that required a fundamental change in the working culture and approach. It was also necessary to identify the potential of Microsoft 365 Copilot and effective ways of using it within the company. LGT faced up to this transformation in order to ensure the company's agility, innovative strength and competitiveness in the digital age.

Solution

Change Management

Strict change management was essential for the global implementation of the digital workplace, which ensured the introduction of 5'000 employees. For this purpose, a suitable training concept was created that adapts to the size of the company and is updated to enable continuous knowledge building. Initially, webinars were offered to provide LGT users with basic knowledge. These were regularly supplemented with new video learnings on topics relating to effective task management, successful online meetings and structured surveys. A comprehensive training portal, the Digital Workplace (DWP) Resource Center, supported this process. In addition, the DWP was continuously developed with new features from Microsoft and feedback from LGT end users.

isolutions is a permanent member of the agile setup at LGT and provides ongoing support with appropriate change management measures: Among other things, the conception of the DWP, the recruitment and training of 150 internal champions, the development of a comprehensive communication and training strategy, the ongoing support of the roll-out of numerous tools and functions of the Microsoft 365 platform (especially Microsoft Teams) or Miro. In its role as a «first mover», isolutions was also able to advise LGT on advanced topics such as Power BI, Digital Employee Experience Management and improving the employee experience with Microsoft Viva. All this with the aim of enabling employees to use the DWP productively in their day-to-day work in order to save time and invest it in value-adding activities.

Solution

Agile way of Working

At the Digital Workplace (DWP) level, it was of central importance to design and implement an agile way of working for the teams. In order to strengthen the understanding and application in the teams, isolutions developed and conducted training courses on agile working methods such as Scrum and Scrumban. In addition, isolutions provided the roles of Scrum Master and Release Train Engineer in the initial phase and was responsible for the planning, execution and moderation of PI planning to ensure a smooth implementation of the product increments. Continuous agile coaching accompanied the digital transformation at all levels to ensure that the teams worked together effectively and agilely. All of this was implemented in close collaboration with the LGT Agile Transformation Office. These measures fostered a dynamic and adaptive working culture that strengthens the company's agility and innovative power. At LGT Corporate level, isolutions also helped with the design of the agile setup and integration into the Confluence and Jira systems. Furthermore, the participation in the Scrum Master Guild was of great importance to promote best practices throughout the company.

Microsoft 365 Copilot

LGT was enthusiastic about the opportunity to use Microsoft 365 Copilot and to act as a pioneer. In order to evaluate the added value and time savings of Copilot, isolutions conducted an extensive pilot phase with LGT. The focus was particularly on the use cases of meeting management, internal communication in teams and the use of Microsoft 365 Copilot as a secure alternative to ChatGPT to ensure the confidential handling of data. The pilot phase also included the piloting of Microsoft Teams Premium and the new Teams (Teams 2.0). Carefully selected users were recruited for the pilot at the beginning to cover a wide range of job profiles and regions. These users were informed about the objectives in several webinars, trained in the use cases and supported with instructions and guidelines. They shared their experiences in a community and in standardized surveys. At the same time, the change management team continuously activated the users with tips, tricks and tasks to support the success of the pilot phase.

An initial evaluation of the pilot showed that users save an average of 20 minutes per week thanks to Copilot in Microsoft Teams. Given the size of LGT, this time saving adds up to thousands of minutes per week. The time savings already experienced through the use of Copilot in Microsoft Teams make LGT confident. The expected increase in efficiency with Microsoft 365 Copilot in other applications such as Outlook, Word, Excel, PowerPoint or OneNote inspires LGT and therefore forms the core of the next steps. In addition, the development of comprehensive governance for the Copilot rollout is of the utmost importance to ensure a seamless implementation and to further maximize the added value for the company.

Benefits

- Continuous change management ensured that LGT employees could seamlessly integrate the Digital Workplace tools into their everyday work.
- The training of 150 DWP Champions supported the adaptation and acceptance of the digital workplace in various regions.
- Scrum Masters and Agile Coaches supported and enabled four Scrum teams to switch to an agile way of working (Scrum/ Scrumban), minimizing friction losses.
- The benefits of Microsoft 365 Copilot are being investigated and evaluated for LGT as part of an ongoing pilot project with 300 participants. This will identify useful use cases on an ongoing basis and make the added value measurable. This enables well-founded decisions to be made about the next steps (global rollout, selective rollout, expansion of Copilot, etc.).

5'000

change management for
5'000 employees at over
25 locations

5

scrum teams with 35 employees
empowered for an agile way of working

20

minutes saved per week for
each pilot user thanks to
Microsoft Copilot in Teams

Partner profile

#weshapethefuture

Founded in the civil defense cellar by three visionaries from the Bernese Oberland, isolutions has been accompanying companies into the digital future since 1999 as the largest dedicated Microsoft one-stop-shop in Switzerland. We integrate Microsoft services in a way, that adds value and has a positive change in the corporate culture.

Supported by over 200 passionate minds consisting of business and technical consultants, change makers as well as software developers, architects and cloud natives, we are driven to peak performance by our customers and their challenges. Together with customers from different industries, we build the bridge to the tech giant Microsoft. All with one goal: To create the best employee and customer experience in order to achieve competitive advantages.

Customers love our inspiring corporate culture, which is contagious. It successfully supports and overcomes organizational or technological challenges. Together with them, we shape the future of teams, products, companies and entire industries.

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