

## **EVP Goal setting**

**Speakers: Pebbles Lacson, Senior Human Resources Manager  
Corrie Purisima, Head of Markets and Securities Services  
Mimi Concha, Head of Wholesale Banking  
Iris Palacio, Chief Risk and Compliance Officer**

**[Text on screen]**  
HSBC

**[Pebbles]**  
Hello and welcome to today's episode of the HSBC Employee Value Proposition. I am Pebbles and with me today are three of HSBC's very inspiring women leaders to talk about the importance of goal setting and setting your team up for success.

**[Text on screen]**  
Goal setting  
HSBC Employee Value Proposition

**[Pebbles]**  
Hello ladies!

**[Guest participants]**  
Hi Pebbles!

**[Pebbles]**  
Thank you for joining the show.

**[Guest participants]**  
Thank you for having us.

Hi Mimi.  
Hi Corrie.

**[Pebbles]**  
So today maybe you can tell us how do you set up your team for success through goal setting.

**[Text on screen]**  
Corrie Purisima  
Head of Markets and Securities Services

**[Corrie]**  
Thanks Pebbles for having us today. For us goal setting is both a top-down and bottom-up approach that we try to set aside time as a top team within MSS even a year before to make sure we strategize and align with both the Bank's goals as well as the functional goals and our CEO's goals and tone from the top.

**[Text on screen]**  
Alignment

**[Corrie]**  
We make sure that we review what went well from the year before as well as what we need to do better as the team and looking at competition as well to make sure that we become even better as a team and as a Bank and as a franchise.

**[Pebbles]**

Thanks Corrie for sharing that.

So, Mimi, tell me. How do you position your team for success by achieving their goals at the start of the year?

**[Text on screen]**

Mimi Concha  
Head of Wholesale Banking

**[Mimi]**

Our goals for the year are often times financially is top-down right. So, we sit down we understand where we are and we thresh it out. I like to keep the goals simple. So, for Wholesale Banking, as we know, we say we will grow our business, we will grow our customers and of course we will grow our people. So that's the foundation.

I think it's important that people are engaged and therefore, to engage people, two things for me: one is to identify the shared purpose. So we say we want to be the preferred international bank of corporates and we share that goal.

**[Text on screen]**

Identify shared purpose

**[Mimi]**

And we break down the goals into mini plans. So every business head in my team would have a mini plan. And then we monitor of course and we review.

**[Text on screen]**

Monitor and review

**[Mimi]**

So we do this mainly two ways. One is to the wider group I do a town hall and some of you are invited in those town halls. We recognise the financial achievements but we also recognise, you know, top performers. We also recognise loyal employees, so 20, 25 years, 5 years etc.

And then of course for me the weekly or bi-weekly check-ins with my one-downs are very important. It's not so much just to discuss challenges, it's really around checking in on engagement and well-being. And in today's world, especially hybrid is very important because we don't really see each other all the time.

And then I think part of engagement and discussions around who do we need within the wider group, not just Wholesale Banking but within the entire branch who do we need to rally or talk to, to make sure that we achieve the goals. So that's why we collaborate with different global functions like Iris, a very important partner in terms of making sure we're able to get those loans out to customers but equally managing other risks like regulatory, legal etc.

**[Text on screen]**

Collaboration

**[Mimi]**

Of course our product partners like Corrie here is someone we have to talk to at the onset, agree goals and then plan our actions. So multi-pipeline meetings are important. And equally of course I think probably the most less spoken about but probably the most important is around people engagement and we partner with team Pebbles and the rest of the HR team around understanding what the issues are of our people and then crafting our response.

**[Text on screen]**

People engagement

**[Mimi]**

So within Wholesale Banking for example we have what we call the 'Wholesale Banking tribe'. Where we understand what are their interests so that we work hard, we play hard.

**[Pebbles]**

Iris, tell us, how do you position your team for success by achieving their goals at the start of the year?

**[Text on screen]**

Iris Palacio  
Chief Risk and Compliance Officer

**[Iris]**

Alright. Thanks Pebbles for that question. So as a function that enables and protects the business, we start by making sure we understand and we align to the country strategy, and we do this through active and collaborative engagements with the business and with other functions as well.

**[Text on screen]**

Understand and align to the country strategy

Collaborative engagements

**[Iris]**

And from there we agree and as to our appetite and guardrails to make sure we are able to achieve sustainable business growth. So throughout the year, we make sure we sustain this momentum by keeping line of sight of where we are against our objectives.

**[Text on screen]**

Sustain the momentum

**[Iris]**

We do this by holding regular town halls and also by having regular check-in sessions with the team members to make sure they continue to be engaged, that they continue to understand what they are achieving towards our common goal. And this enables us to, you know, make sure we are actually able to celebrate our wins, recognise top performance and also calibrate our efforts whenever, you know, we seem to be a little off and then make sure we go back to how we are in terms of achieving our targets.

**[Mimi]**

Just to add to that, within HSBC if you talk to other people, they always perceive HSBC as like more family-oriented than other institutions, right. So I really firmly believe that. People who come from other international banks have said the same thing. And that helps, in terms of fostering collaboration across global functions like Risk and lines of businesses like ourselves.

**[Iris]**

And I echo that actually and I think the culture in HSBC fosters this kind of collaboration. And while the discussions can be difficult, it's always a healthy debate between the business, the Risk function and also the other different areas of the Bank. So that in the end we're actually able to achieve what's best for the customer and what's best for the Bank.

**[Text on screen]**

Achieve what is best for customer and the Bank

**[Pebbles]**

Thanks for sharing that.

That concludes today's episode. Thank you for joining us. I hope you got insight into what makes working with HSBC both meaningful and truly rewarding.

**[Text on screen]**

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