



mindfulness@hsbc

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# mindfulness@hsbc – Award winning approach...



Significant empirical evidence and research exists proving the benefits of regular mindfulness practise including improved resilience, reduced stress and sustained wellbeing. HSBC is on a journey to support its most valuable asset – its people – by offering a sustainable toolkit of mindfulness based offerings as part its Wellbeing agenda. Implementing an authentic mindfulness programme in a company as large, complex and truly global as HSBC is a huge challenge as demonstrated by the various mindfulness initiatives across HSBC countries. This submission focusses on the implementation of the UK mindfulness@hsbc community while we continue to connect with our global colleagues to guide and learn from their mindfulness at work experiences.

We truly believe that the success of the UK's mindfulness@hsbc community thus far is largely due to its organic development through a grass roots employee led movement over time, nurtured by its passionate leaders, rather than as a formal top down approach from Management. Our approach has not only been referred to as 'trailblazing' and 'unique' by our training provider – Kalapa Leadership Academy – but has won an award! The UK government sponsored All Party Parliamentary Group on Mindfulness (MAPPG) awarded HSBC for our innovative, ground breaking approach to mindfulness in the workplace. Engagement with external parties, contributing to research, supporting communities and realising measurable outcomes are all integral to our continued success embedding within a complex corporation.

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# mindfulness@hsbc – Growing a sustainable model...



In 2012 Mari Thorman, an HSBC IT Architect, started the first HSBC UK mindfulness practise drop-in sessions in Sheffield as an informal offering for interested colleagues. HSBC Management supported Mari's passion and experience by funding an offsite location to share mindfulness techniques with employees. Mari invested her own time and money in private mindfulness training, volunteering in Sheffield community and guiding HSBC sessions. The Sheffield sessions became increasingly popular as Mari partnered with like-minded colleagues to offer sessions in London and Leeds. In 2014, the small network launched their offering across the UK which grew quickly to circa 800 members, creating significant demand for more sessions and locations.

The network was excited with employee response, however the volunteers acknowledged the demand exceeded their time and effort available, adding pressure and stress on top of their 'day jobs'. This led to discussions how the network could scale up the offering to reach wider HSBC UK sites while retaining the original authentic, employee led feel. Subsequently in 2016, a separate internal leadership programme delivered a 'payback' project to implement the network's vision to increase the availability and scope of mindfulness activities in HSBC by creating and training a community of 'Mindfulness at Work Champions'. Through a formal, structured training programme, HSBC equipped the Champions with tools and knowledge to cultivate mindfulness in a large complex organisation at the foundation level - its people. The Champions in turn provide the desired mindfulness practise sessions, workshops, presentations resources and information at their local sites demonstrating positive measureable outcomes and return on investment.



# mindfulness@hsbc – Embedding the Foundation...



In 2016 we evaluated a variety of external training suppliers and offerings. We ultimately partnered with Kalapa Leadership Academy to design and deliver the HSBC Mindfulness at Work Champion training programme. HSBC funded the inaugural intake of 40 Champions across 30 UK sites who attended both onsite and webinar based training modules throughout 2017-2018. The Champions are now equipped to host and lead sessions, present multiple topics, coordinate events and host workshops – in person and remotely over video.

As of February 2019, we have 22 active trained Champions in 23 UK sites while the mindfulness network increased to circa 2500 members, largely due to the reach of the Champions. In the subsequent 4 months after training, we can demonstrate a 75% financial return on investment as the Champions collectively delivered 56 hours worth of mindfulness event events and hosted over 200 (some recurring) mindfulness sessions, reaching circa 2600 colleagues at various managerial/staff levels across the UK (and some globally). This is a tremendous increase in employee impact from Mari's original guided sessions in 2012 which averaged 20 people per session!

A significant number of HSBC employees work in a call centre environment or on a shift-based schedule. This can limit some employees' ability to partake in traditional mindfulness sessions. A few of the Champions in different locations and Business lines are collaborating on a pilot to enable their call centre colleagues to utilise different techniques and options to help cultivate their personal practice flexibly allowing them to adapt to the requirements of their roles and responsibilities in the call centre.

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# mindfulness@hsbc – Sustaining authenticity...



Sustainability is an integral outcome of the investment in mindfulness@hsbc. We've launched the #UnBusy Project to build our mindfulness based offerings as consumable products and offerings while developing a sustainable operating model to support our Champions, colleagues and infrastructure. The next phase includes additional pilots and new training for Champion Leaders which includes a 'train the trainer' module to reduce reliance on external training providers to deliver the typical 8 week webinar modules, large scale audience offsites and to deliver globally. We are also designing and embedding mindfulness courses into the HSBC University as part of employee personal development.

Our colleagues in many countries (e.g. Switzerland, HK, USA, Australia, India, Malta, UAE, Canada, China, etc) and Business lines are very interested in implementing the HSBC Mindfulness at Work Champion programme. Funding – both monetarily and resource time – is key to the continued success of the programme and remains our biggest challenge.

Maintaining authenticity amidst corporate realm is non-negotiable. To this end, Mari is building an HSBC Mindfulness at Work Advisory Board with members not only from HSBC, but also in the Mindfulness Community. The aim is to ensure HSBC stays true to its commitment to offer mindfulness to its employees while allowing it to be shaped and led by the employees themselves.






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## Our Charter

-  Provide resources and a hub for sharing experiences and knowledge of mindfulness techniques to all HSBC colleagues from any background in an inclusive manner.
-  Adopt a positive and enabling attitude to fellow HSBC colleagues as they may choose to learn more about Mindfulness techniques.
-  Provide non-judgmental or directive support. Where relevant direct colleagues experiencing mental health issues to appropriate internal EAP pathways within HSBC.
-  Not be aligned or allied with any specific Religious traditions or meditations.
-  Focus on Mindfulness as a secular practice. Use scientifically proven resources. Contribute to the wider research and best practices for introducing mindfulness into the workplace protecting our people and reputation.

# mindfulness@hsbc – Staying true to...



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## Ourselves

## Each Other

### Avoid McMindfulness!!!

Authentic – ‘walk the walk’

Embed into bloodstream

Reciprocal respect

Explicit Management support and commitment

Shaped by employees

Self –sustaining and cost effective

Demand led from employees

Learnings from pilots

Must not be ‘target’ driven

Evidences metrics and feedback

Mentoring, support practical resources

Living it, not just teaching it

Enhance Screening for candidates

Research and outcomes led

Understand organisation

Navigate organisation blockers

Evolving and adaptive

Avoid supplier contract binding

Must not cause stress to volunteers

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# mindfulness@hsbc – Demonstrating Success...



As with any other corporate-funded programme, mindfulness@hsbc must demonstrate return on investment based on measurable outcomes and success criteria.

Can we more sustainably meet demand and embed?

🧠 75% ROI in 4 months

Can we demonstrate positive impact?

🧠 Reported increase of wellbeing and performance

In less than 2 years, exponential increase in:

- 🧠 Number of trained mindfulness champions
- 🧠 Number of UK sites offering mindfulness techniques
- 🧠 Number of employees reached

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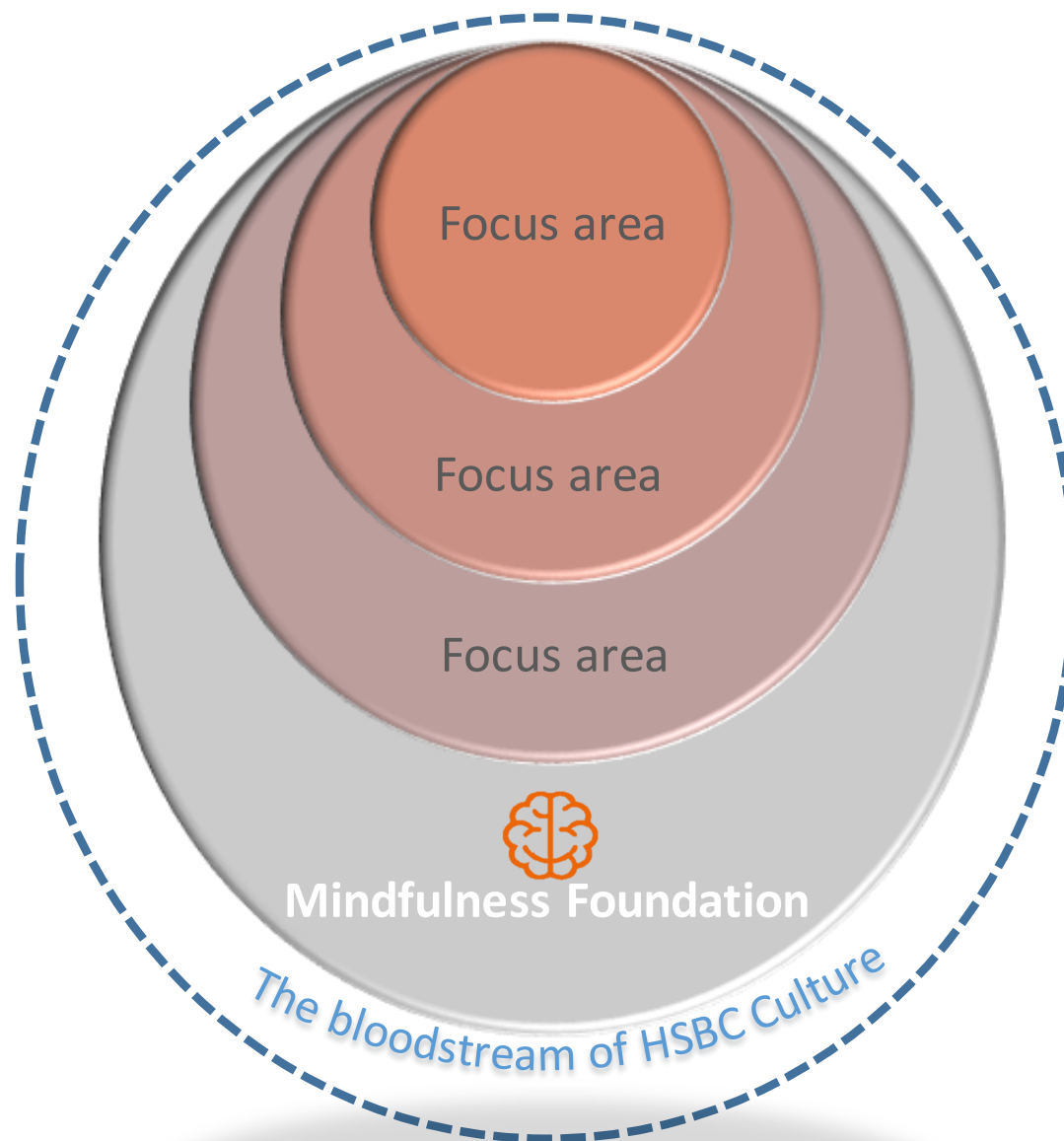
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# mindfulness@hsbc – Cultivating into corporate culture...



Mindfulness Foundation techniques are intended to be the base available to all employees individually or as part of team initiatives. We acknowledge one size can't fit all, therefore mindfulness@hsbc is facilitating various pilots across a range of business lines and countries based on specific 'Focus Areas' to further test and learn how a large, global corporate can authentically embed mindfulness based approaches into its culture while sharing best practice and supporting offerings which best resonate with employees linked to the Focus Areas.



## Example Focus Areas:

- 🧠 Business Lines
- 🧠 Locations
- 🧠 Employee Grade
- 🧠 Corporate Programme (e.g. Diversity & Inclusion, Wellbeing)
- 🧠 Employee Networks
- 🧠 Topics of interest (e.g. resilience, collective intelligence, cognitive flexibility, unconscious bias etc)

## Pilots / Events for various Focus Areas:

- 🧠 HSBC Wellbeing fairs
- 🧠 Network Launch Campaigns
- 🧠 Top UK Leadership conferences
- 🧠 Compassion Workshop
- 🧠 Global Business webinars
- 🧠 International Mindfulness day
- 🧠 Parents event - Mindfulness in Schools
- 🧠 Technology team meeting presentations
- 🧠 Monthly dial-in sessions

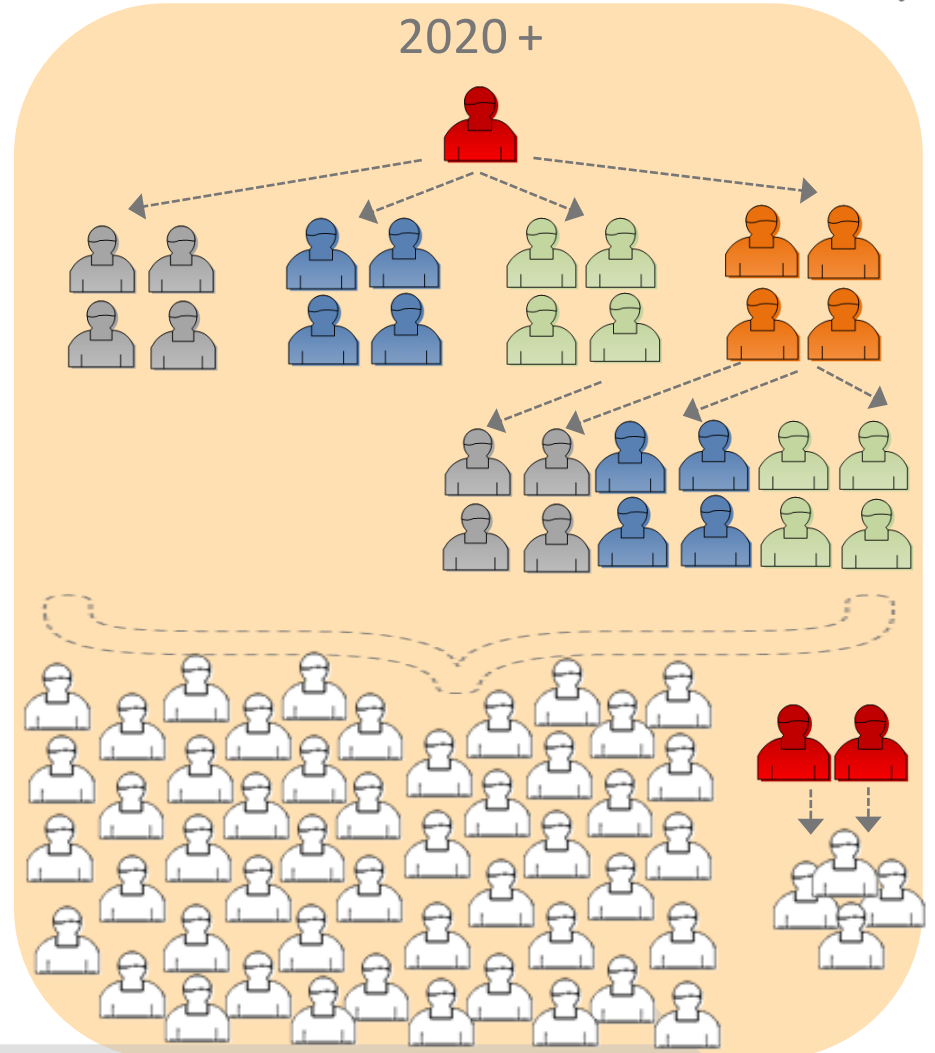
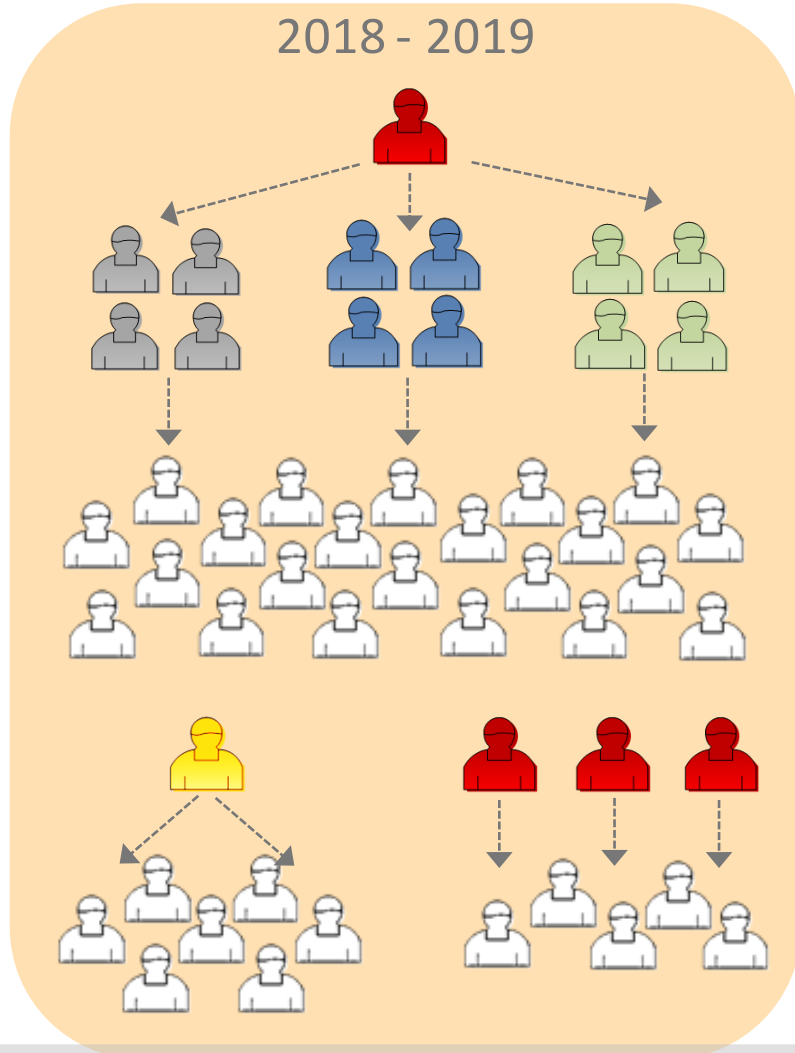
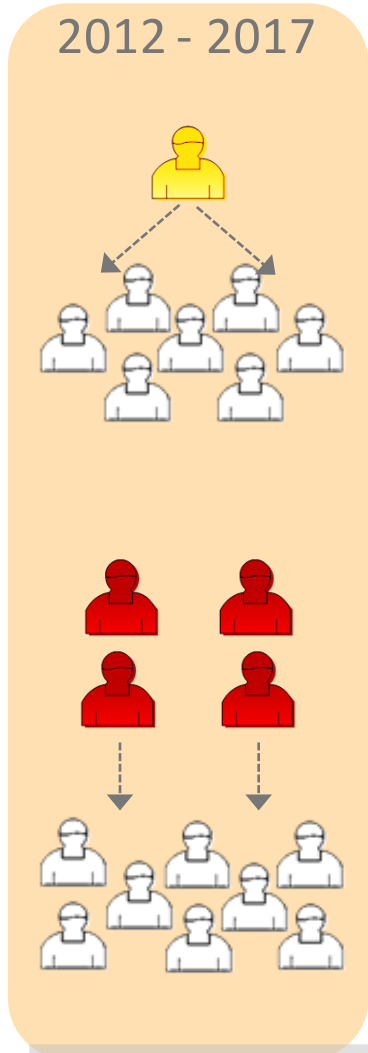


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# mindfulness@hsbc – Envisioning the Champion model...

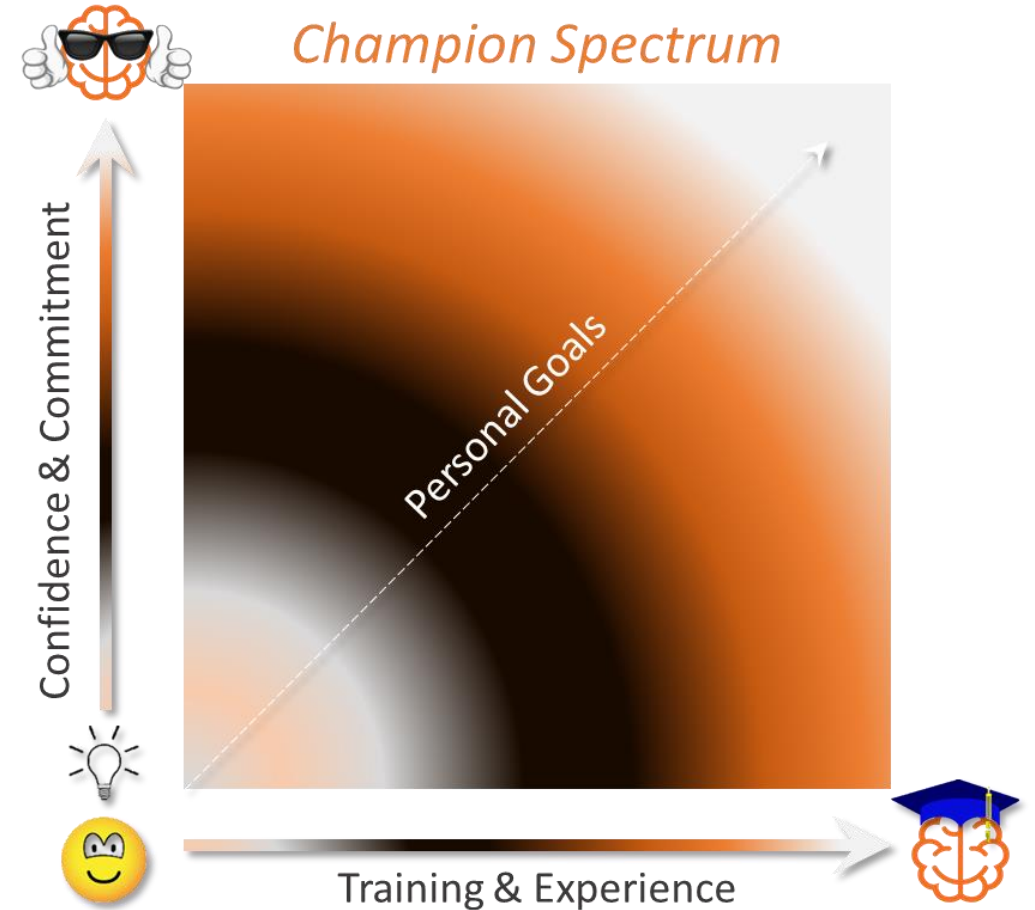
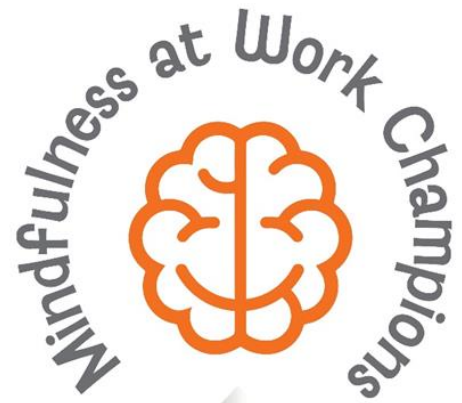


*Embed sustainably into HSBC Culture via its people to scale and focus use of external experts*

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# mindfulness@hsbc – Travelling the Champion Journey...



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# mindfulness@hsbc – Building the Champion pathway...



## PROMOTER

## FACILITATOR

## LEADER

## TRAINER

### PREREQUISITES

- Passion for Mindfulness
- Personal practise
- Sign up to the Mindfulness Network Charter
- Self-directed learning using resources on Mindfulness Sharepoint
- 6-8 week Mindfulness Foundations course preferable
- Line management support

- As Promoter plus:
- 6-8 week Mindfulness Foundations course completed + 2 month min practice diary evidenced (>6month pref)
- Module 1 – Mindfulness@ HSBC Foundation complete.
- Module 2 – Mindfulness Champion Facilitator course complete (4 day offsite) with assessment and activity feedback for 3 months+
- Line management support

- Facilitator module complete with +12 months evidenced Champion activity
- Module 3 - HSBC Mindfulness Leader complete (Shadow course + 4 day offsite) which will cover the structure and delivery of a Mindfulness Foundations course
- Supervised Assessment of course delivery by Kalapa/HSBC team
- Senior management support

- 12+ months mindfulness practice
- Leader phase completed with > 6 courses completed with feedback
- Proven Skills in working with others / training/ facilitation
- Module 4 - HSBC Mindfulness Trainer course completed (3.5 days offsite)
- Full support of line management and Senior Exec / HR sign off

### OUTCOMES

- Active member of M@H network
- Promotion and communication of mindfulness resources in line with Charter
- Book rooms for dial-in sessions or guest 'Guides'
- Report volume stats, share surveys
- Signposting to EAP support

- In addition to Promoter outcomes,
- Facilitate local mindfulness practice sessions using approved meditation recordings or guiding themselves if confident
  - Host individual 'Mindfulness in the Workplace' workshops using Working Mind content (concepts only)

- In addition to Facilitator outcomes,
- Co-Lead a 6 week Mindfulness Foundations course within HSBC to local cohorts
  - Supervise Facilitator Champions
  - Deeper understanding of different styles of meditation instruction and experiential exercise

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- In addition to Leader outcomes,
- Deliver Facilitator and Leader Champion training
  - Offer supervision for all Champion levels
  - Lead a 6 week HSBC Mindfulness course week training alone

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# mindfulness@hsbc – Scaling the impact...



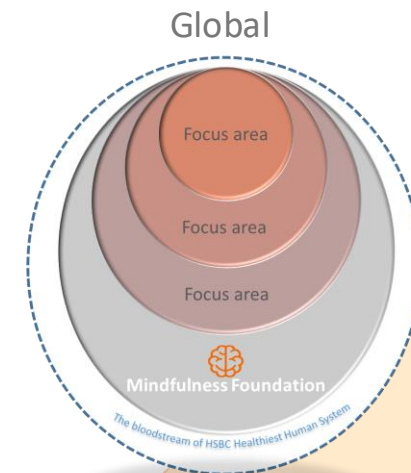
✓ Exponential increase in scale and impact since launching Champions model in 2017!



Sheffield



Leeds London



Number Employees Reached

2012

2014

2017

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2019

2020 +

Represents number/locations of mindfulness volunteers/Champions

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# mindfulness@hsbc – Building & Expanding in 2019-2020

Project #UnBusy  
to deliver

EXECUTIVE STEERING COMMITTEE

WORKING  
GROUP(S)

PROJECT LEADS

ADVISORY  
BOARD

OPERATIONAL GOVERNANCE & OVERSIGHT BODY

UK MINDFULNESS BASED  
OFFERINGS' MATURITY\*

PRODUCTS

Employee  
Foundation  
Education

Champion  
Development  
Training

Targeted  
Business  
Programmes

Practitioner  
Resources

enable

SERVICES

Talks & Events

@Work Guided  
Practices

Research &  
Community  
Outreach

Consultation &  
Supervision

\* Shading in circles depict maturity level

EMPLOYEE LED NETWORK & COMMUNITY

Sustainable  
Operating  
Model



# mindfulness@hsbc – 2H19 #UnBusy Project Launch...



**Project #UnBusy:** Design/Build TOM & Offerings, Pilot Courses, Re-launch Network

Mindfulness Foundation Webinars Course (15OCT19-26NOV19)

2020 Planning

Mindfulness Champions Promoter Course (28OCT19-09DEC19)

**82 colleagues**

GCB3-8

Diversity in  
gender, ethnicity,  
age, motivations

**13 Business Lines**

**45%/55%**

**Tech/Non-Tech**

**28 locations**  
**8 countries**

*Integrate into 2020 Wellbeing Strategy!!*

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# mindfulness@hsbc – 3Q19 Pilot feedback excerpts...



*'...Wonderful program ... well paced, well designed ... I will be taking it to a larger audience for sure!'*

*'...One of the best, most useful courses I've attended...'*

*'...this course shows how we can foster creativity, positivity and thus productivity in the workplace, not to mention the wellbeing of our staff...'*

*'...the module on productivity should be converted into a mandatory learning - Not only would this publicise the excellent work of mindfulness (and encourage the sceptical) but it would increase productivity'*

*'...learnt a lot about the science and research that validates why it is a good thing to do...'*

*'...The recognition of positivity this course has brought me both at work and at home has been incredibly insightful and is something I will try me very best to build into my everyday life in future - Thankyou!'*

*'...really enjoyed the course and looking forward to continuing my journey as a Champion. I think this course would be hugely beneficial for our senior management to help understand their own stress and the stress their staff are also facing'*

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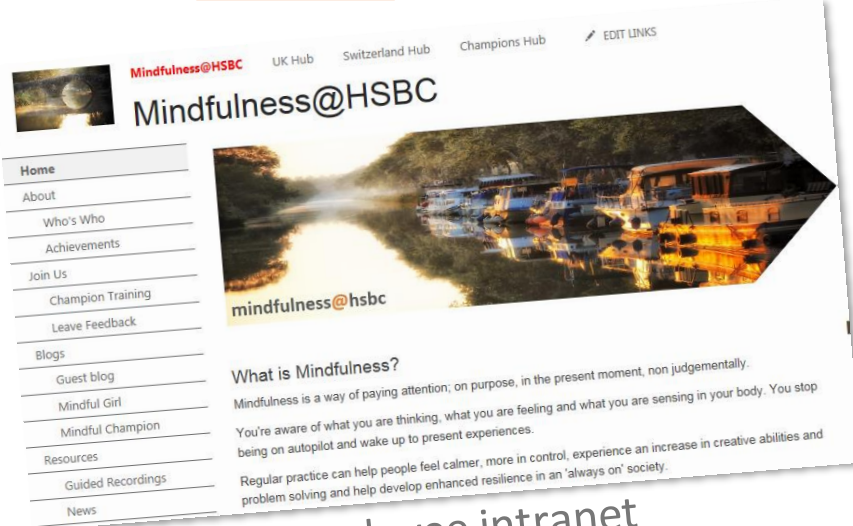
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# mindfulness@hsbc – Supporting the community...



## Champion Pathway

	PROMOTER	FACILITATOR	LEADER	TRAINER
<b>PREREQUISITES</b>	<ul style="list-style-type: none"> <li>Passion for Mindfulness</li> <li>Personal practise</li> <li>Sign up to the Mindfulness Network Charter</li> <li>Self-directed learning using resources on Mindfulness Sharepoint</li> <li>6-8 week Mindfulness Foundations course preferable</li> <li>Line management support</li> </ul>	<ul style="list-style-type: none"> <li>As Promoter plus:                             <ul style="list-style-type: none"> <li>6-8 week Mindfulness Foundations course completed + 2 month min practice diary evidenced (&gt;6month pref)</li> <li>Module 1 – Mindfulness@ HSBC Foundation complete</li> <li>Module 2 – Mindfulness Champion Facilitator course complete (4 day offsite) with assessment and activity feedback for 3 months+</li> <li>Line management support</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Facilitator module complete with +12 months evidenced Champion activity</li> <li>Module 3 - HSBC Mindfulness Leader complete (Shadow course + 4 day offsite) which will cover the structure and delivery of a Mindfulness Foundations course</li> <li>Supervised Assessment of course delivery by Kalapa/HSBC team</li> <li>Senior management support</li> </ul>	<ul style="list-style-type: none"> <li>12+ months mindfulness practice</li> <li>Leader phase completed with &gt; 6 courses completed with feedback</li> <li>Proven Skills in working with others / training/ facilitation</li> <li>Module 4 – HSBC Mindfulness Trainer course completed (3.5 days offsite)</li> <li>Full support of line management and Senior Exec / HR sign off</li> </ul>
<b>OUTCOMES</b>	<ul style="list-style-type: none"> <li>Active member of M@H network</li> <li>Promotion and communication of mindfulness resources in line with Charter</li> <li>Book rooms for dial-in sessions or guest 'Guides'</li> <li>Report volume stats, share surveys</li> <li>Signposting to EAP support</li> </ul>	<ul style="list-style-type: none"> <li>In addition to Promoter outcomes,                             <ul style="list-style-type: none"> <li>Facilitate local mindfulness practice sessions using approved meditation recordings or guiding themselves if confident</li> <li>Host individual 'Mindfulness in the Workplace' workshops using Working Mind content (concepts only)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>In addition to Facilitator outcomes,                             <ul style="list-style-type: none"> <li>Co-Lead a 6 week Mindfulness Foundations course within HSBC to local cohorts</li> <li>Supervise Facilitator Champions</li> <li>Deeper understanding of HR and EAP support</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>In addition to Leader outcomes,                             <ul style="list-style-type: none"> <li>Deliver Facilitator and Leader Champion training</li> <li>Offer supervision for all Champion levels</li> <li>Lead a 6 week HSBC Mindfulness course week long alone</li> </ul> </li> </ul>



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