



CLIENT SUCCESSES

INDUSTRY:
BANKING
AND FINANCE

LEADERSHIP DEVELOPMENT COMMUNITY CREDIT UNION

BACKGROUND

Community Credit Union (CCU) in Texas is the largest community-based credit union in the United States with assets of over \$1.6 billion. CCU's 625 employees serve some 80 communities in the Dallas-Ft. Worth area from more than 34 locations. Services include personal and business banking, loans, mortgages, and a variety of investment options. With 250,000 members, CCU continues to grow. Currently, 650 companies offer CCU membership as a benefit to their employees.

NEED

CCU didn't have a formalized leadership development program in place to support the organization's nearly 200 leaders. "Training was sporadic, and we wanted to offer leaders more consistent intervention, delivery, and support," explains Bryan Brooks, CCU's Manager of Training and Development.

Liz German, Vice President and Chief Human Resources Officer, notes, "We had a lot of homegrown leaders who were very good at their jobs, but 'green' in leadership experience. We wanted to give our managers core skills in interacting with people, so they would be able to do things like give feedback and hold performance discussions and get the desired outcomes. And we

wanted them to be able to practice their leadership skills in a safe environment."

SOLUTION

Results-Based Interactions (RBI), one of DDI's Multi-day Leadership Development Programs, provided the combination of skill-building in leadership essentials and flexible, timesaving delivery that CCU was looking for. Competencies developed included Building Strategic Working Relationships, Coaching, Communication, Follow-Up, Facilitating Change, Gaining Commitment, Inspiring Others, and Managing Conflict.

The program rolled out to senior and line managers in branch sales and operations positions in six half-day sessions. Brooks facilitated the training. Initially, sessions were spaced four to five weeks apart, but based on participant feedback, CCU experimented with other delivery intervals and will deliver future sessions every three weeks. To keep learning fresh, participants completed a variety of assignments between sessions. Concurrently, participants' managers took part in the training themselves to become familiar with the program and better support their direct reports' development.

During RBI, participants are introduced to DDI's Online Performance and Learning system, *OPAL*[®], as a just-in-time resource they can use throughout their CCU career. As a further development tool, leaders participate in an on-line DDI *Leadership Mirror*[®] 360° assessment survey within six months of completing RBI. The survey

results highlight strengths and development needs from a unique perspective: comparing how the individuals see themselves versus how others perceive their performance relative to the core competencies. Brooks, German, and three other specially trained CCU staff members serve as performance consultants and coaches to debrief *Leadership Mirror*[®] results with each individual, map out a development plan (using *OPAL*[®] as a development resource), and provide ongoing support.

To gauge results of the training, CCU completed an engagement survey, using DDI's *E3*SM employee engagement measurement tool, to capture employee engagement before and after the training. Numerous studies have shown that engaged employees are more satisfied, productive, and likely to stay with the company. By directly impacting their employees' work environment, leaders play a key role in fostering or inhibiting engagement.

CCU is very pleased with the program's results. "People went through the program so eager and hungry to learn," German says. "It was a practical way to reinforce a lot of behaviors and practices many of the leaders intuitively knew, and was also a great grounding in the basics for those who were starting fresh."

"What stands out to me," Brooks notes, "are the results that happen from leaders who fail to engage—the negative impact that has on employees. It's just as powerful when people elect not to walk the talk and stay stuck in 'autocratic mode.' There's a dramatic, direct connection between leaders' buy-in and use of the training and their people's engagement and drive to perform and produce."

German believes one of the biggest impacts has come from the mechanisms now in place for ongoing support. "Managers can call one of the performance consultants when they have an issue and get reinforcement directly tied to the training," German says. "We talk them through it, asking if they've done this step or taken that particular action that was covered in class. It's been very helpful to show how the classroom learning applies to everyday life on the job." *OPAL*[®], as well, is always available as a resource for handling difficult situations as well as assisting managers in their self-development.

About 75 leaders have participated since 2003, with more sessions to come. "There's a lot of interest within the organization," German concludes. "Everyone is asking for it."

RESULTS

- > For the first time, CCU now has a practical and effective leadership development program in place.
- > 95 percent of leaders felt their skills improved as a direct result of the program.
- > When leaders' skills improved, their employees became significantly more engaged in their work. More than 50 percent of employees indicated that their work environment had become more engaging since the training was introduced.
- > In the first year, the program will pay for itself, yielding a human capital ROI of 244 percent. In four years, the program will yield an ROI of 761 percent.

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