

## OVERVIEW

This case study outlines the key challenges and results for Orlando Federal Credit Union. The member-owned, non-profit credit union provides a wide variety of financial services and products, ranging from investment advice to retirement planning. Orlando Federal Credit Union was founded in 1936 and currently has over \$136 million in assets and employs 86 people. It operates 6 branch offices, 2 shared branch offices and 1 off site administrative center.

## OBJECTIVES

- Improve the level of service for members.
- Increase the number of memberships.
- Fill the gap between internal and external service.
- Ensure that all the teams within the organization adhere to the same standards.



## SOLUTIONS IMPLEMENTATION

The credit union formed a partnership with Integrity Solutions® in January of 2008. All 86 employees, from top executives to front-office staff, participated in the Integrity Service® program.

Prior to partnering with Integrity Solutions®, the Vice President of Operations had spearheaded sales and training initiatives solely for his branch team. There was a gap in service between different teams within the organization. The purpose of Integrity Service® was to enhance the spirit of teamwork and engage all employees in the internal/external service process.

In order to improve internal services and streamline internal activities, it was essential to bring all the teams together. The ultimate goal was to achieve team synergy and make sure that everyone was on the same page. Every team had to learn how to address member-related issues and solve problems with maximum efficiency. All the processes were laid out in a comprehensible manner. This allowed participants to engage in discovery learning, which enabled them to build positive self-beliefs and strengthen internal collaboration.

## IMPACT

- Internal service at all levels of the Credit Union improved. According to our latest internal survey we received a 4.8 out of a possible 5 for internal communication and service.
- Employee turnover on the sales and service side has decreased by almost 35%.
- Sales rewards for employees have increased from 3.1% to 4.62%.
- Improved performance led to significant increase in memberships. The organization enlisted 344 net new members in the first quarter of 2008.

*"The integrity process works! The system helped all credit union employees from the top down bridge the gap between internal and external service. This ground breaking process for the credit union not only changed our service culture and provided us with valuable tools; it also changed our employees views on service and helped improve them personally as well as professionally."*

**Jim Santiago—Vice President of Operations, Orlando**