

Case Study

OVERVIEW

The focus of this case study is a fast-growing credit union that helps businesses and individuals manage their accounts and achieve their financial goals.

The credit union is a member-owned. They provide an extensive array of products and services, ranging from investment advice to mortgage loans. The credit union has been in existence for almost 80 years, operating 55 branches in 4 states. They employ almost 1,000 people. Members of this financial institution include state and local government employees as well as leading corporations.

OBJECTIVES

- To enhance operational sales/service skills of employees.
- Increase member satisfaction and member retention rates.
- Coordinate training, communications, and technical procedures between offices.
- Ensure that each member's experience is consistent the credit union's mission.

SOLUTIONS IMPLEMENTATION

The credit union has been in partnership with Integrity Solutions® since 1994. On a quarterly basis they send 15 participants through Integrity's service program. Each participant walks away with a solid understanding of their role in member satisfaction. They begin to understand the unique value that they bring to the organization as individuals. The goal is to help employees uncover their individual strengths and abilities. Through the behavior change and self-discovery process each participant learns how to put their strengths to use, build confidence and serve internal associates and external members with maximum efficiency.

The follow-up sessions bring about a long-lasting and positive change in behavior, values, and beliefs through self discovery and repetition. Managers who attend the graduation ceremony are consistently impressed by the speeches given by their employees and the level of enthusiasm that they demonstrate.

To ensure the effectiveness of the program, employees participated in a service skills assessment which is conducted BEFORE and AFTER the follow-up course sessions. The assessment is completed by their managers and peers. The results of the assessments as well as the member evaluation survey revealed a positive change.

IMPACT



- ✓ To enhance operational sales/service skills of employees.
- ✓ Increase member satisfaction and member retention rates.

"This is an incredible program. I thoroughly enjoyed the training process. It was a wonderful opportunity for me to learn more about a program which I already believe in. We have endorsed Integrity Solutions® since 1994, and have seen substantial growth in assets and employee satisfaction. I have seen the confidence level of our employees increase substantially and a visible shift in attitudes from skeptical to enthusiastic."

Kimberly B.— Training Generalist