

Banking Case Study



OVERVIEW

First Dakota National Bank had its beginning in 1872 when it became the first, fully-chartered bank in the Dakota Territory. Located in Yankton, SD, the bank grew steadily as it served the needs of settlers, the river traffic and the flourishing businesses. Today, First Dakota has grown to a network of 16 full service and 6 loan production offices with assets over \$1 billion and offering a complete array of banking, investment and trust services.

Challenges

- Rapid growth and expansion
- Strong legacy and culture to sustain and continue growth
- The need to partner with a training program that closely aligned with their corporate values and customer-focused philosophy
- Build cross-selling skills and positive attitudes about selling
- Desire to instill continuity across all departments and areas of responsibility

Programs and Participants

To date, every First Dakota employee has participated in at least one of these core programs.

SOLUTION	TARGET AUDIENCE
Integrity Service®	Accounting, Compliance, Audit, Loan Accounting, Loan Operations, Administration, Credit Review, Lending Assistants, Maintenance and other support
Integrity Selling® for Service	Tellers, Personal Bankers, CSR's, Lending Assistants
Integrity Selling®	Ag Lenders, Business Bankers, Trust Officers, Brokerage, Marketing, and Executive Management
Integrity Coaching®	Supervisors and Executive Management

First Dakota is now proactively pursuing deeper integration and long-term benefits through a series of 'next level' sustainment strategies, including:

- Performance Accelerators — structured reinforcement sessions tied to core course curriculum.
- Integrated select models, concepts, forms and other Integrity tools to create a seamless approach within their CRM system.
- Advanced Leadership training — aimed at providing Branch Managers a common platform and accountability to 'pull through' application and related coaching to entire team.
- Behavior Styles® assessments — personalized reports used as development/coaching platform.
- Q Mindshare — an electronic communication and reinforcement tool aimed at reinforcement and retention of learning.

Impact

First Dakota has met and achieved their goals in every aspect of their banking growth since implementation of the training. The proof is in the success metrics. Every metric — assets, loan volume, deposit volume, households and services per household — are up.

INTEGRITY SUCCESS MEASURES

May 2012 vs. May 2014

	Assets (MM)	Loan Volume (MM)	Deposit Volume	Households	Services Per HH
% Change	22%	26%	22%	7%	11%

“The proof is in the success metrics. Every metric – assets, loan volume, deposit volume, households and services per household – are up.”

Rob Stephenson, President & Chief Operating Officer

Facilitator Client Feedback

“Integrity Selling has strengthened our team’s engagement to provide the best customer experience in a non-pressured environment. Levels of awareness and self confidence have improved our ability to discover the customer’s needs by asking the right questions and more importantly listening to our customers.”

*Marc Mooney, Director of Branch Administration
First Dakota National Bank*

“Integrity Training is hands-down the most comprehensive and relevant sales and service training I’ve had the privilege to utilize. It’s easy to implement and literally has the ability to change people’s lives. Love it!”

*Shelly Eilers, Vice President eBanking & Cash Management
First Dakota National Bank*

“The results and growth I witnessed at graduation was the most fulfilling aspect. Many times as a facilitator you wonder if you are reaching the attendees, but when you hear their testimonials at graduation you understand the magic of the program all over again.”

*Deb Weddingfeld, Senior Vice President
First Dakota National Bank*

“We chose Integrity Selling because it mirrored our culture.”

*Nate Franzen, President Agri-Business Division
First Dakota National Bank*

“Integrity Solutions is just what we needed for our front line staff! They have gained the confidence they need to provide excellent customer service. They now realize that sales is service and service is sales! They take pride in their work and think of themselves as problem solvers.”

*Marcy Moser, Vice President
First Dakota National Bank*

“I’ve enjoyed watching employees become aware that selling a product is the end result of a process that involves genuine care for uncovering the customer’s needs. If we’ve done a good job of communicating the products and services we offer, we’ll not only sell the product/service the customer desires, we’ll also sell ourselves as the bank they trust for all their future banking needs.”

*Aaron Ness, Executive Vice President Market Manager
First Dakota National Bank*