



**COASTAL
COMMUNITY**



Case Study

Coastal Community's Story: Leaders in Building Relationships

Background

Serving island communities for over 60 years, Coastal Community Credit Union has grown to be the largest Credit Union based on Vancouver Island and the Gulf Islands. Coastal Community stretches from Port Hardy to Victoria and has approximately 80,000 members and clients - twenty-three branches, fifteen insurance agencies, 3 business centers and wealth management services. With over \$2 billion in assets under administration, Coastal Community offers caring and helpful service through an extensive network of personal banking, insurance, investment and business services centers.

In January of 2005, three credit unions merged to form Coastal Community Credit Union (CCCU). During 2005, CCCU planned for 2006 – the time scheduled for the implementation of the merged structure, policies, operating procedures and banking systems. The Executive Team recognized that a key factor in the successful integration of the three credit unions was to have a disciplined process to deal with the human side of change. In late 2005, Coastal Community Credit Union contracted with Insights Vancouver to develop a change management process using the Insights Discovery™ system.

Insights Vancouver worked with several internal champions and designed workshops for four interdependent groups: the Executive Team, the Integration Task Force, Managers, Assistant Managers and Supervisors. All four groups participated in multi-day workshops to increase their understanding of self and others and their competence and confidence in responding to a changing environment. Workshops began with the *Insights Discovery Personal Profile* and the *Making Change Work* series of modules including *Insightful Change* and *Effective Communication* (Adapting and Connecting).

All groups received a *Making Change Work* learning guide to support their leadership through times of change; this 200 page resource included a review of key best practices at each phase of the change process, along with checklists, job aids, exercises and suggestions for building commitment (*Change Commitment Model*). In addition, it was critical for all key leaders to create balanced communication messages to respond to the different reactions and questions that employees would have about the organizational changes. The executive team crafted their messages using the *Insights Discovery 4-P Model* for balanced communications: purpose, plan, big picture and people.

A group of courageous leaders at Coastal Community Credit Union took on a mammoth project in 2005 - to create one credit union for Vancouver Island. Coastal came out of the merger stronger than ever - ready and able to withstand the economic downturn of 2008.

The Business Challenge

2008-2010 proved to be a period of tumultuous change for Coastal Community. At a time when some companies were battening down their hatches due to an uncertain economic landscape, Coastal was venturing forward with numerous plans that had been in the works since Coastal's merger of three credit unions in 2005.

A significant amount of organizational changes occurred during this two year period - some planned and some unplanned – a CEO retirement, six unplanned critical incidences (attempted robberies, medical emergencies), a merger with Quadra Credit Union, significant service delivery changes resulting in a closure of one retail branch and three insurance agencies, a new CEO with a new vision and strategy, and re-designs of organizational structures and positions for six departments.

During this period of time, Coastal Community also promoted a significant number of employees to management positions; many of these managers were new to the role of leading people and were challenged with the human dynamics of leading a team. HR team members were asked to support many of these new managers and soon realized that conflicts were occurring because of a lack of understanding of human dynamics, interpersonal communication and relationship-building skills.

In addition to the internal challenges of the newly promoted managers – Coastal’s Executive Team had identified that there was a gap in relationship-building skills that was affecting sales growth and the delivery of a quality Member/Client Experience. Deborah Edwards, Manager of Employee Development was asked to identify training solutions to support service delivery employees to be leaders in building relationships.

The Business Need

With a new CEO in the helm, 2010 brought with it a new vision and strategy for Coastal Community: *we will be the leaders in building relationships that improve financial health, enrich people’s lives and build healthier communities.*

The Executive Team and CEO produced a DVD explaining the new vision and purpose statements (three experiences). This became the start of a changing focus for the organization. Each experience was explained in detail and employees were asked to take on the change to live these experiences. Bruno Dragani, Chief People and Administration Officer asked all employees to take on the leadership challenge and begin to live our vision by being a leader in everything we do. This challenged all employees to take the courage needed and commit to learning how they could lead from any level in the organization.

Coastal’s vision is supported by a purpose that is strongly tied to three experiences:

Member Experience: We will be the leaders in building strong relationships by being more helpful and caring, and improving financial health.

Employee Experience: We will be the leaders in creating an environment where we say great things, do great things, and where we want to stay.

Community Experience: We will be the leaders in making a visible and meaningful difference in building healthier communities. Our communities are our home.

The speed of change at Coastal was creating some leadership challenges. Significant change has an impact on the people side of the business and the way individuals handle change, conflict and stress will determine the resilience of an organization. The HR Team determined that dysfunctional conflicts were occurring between employees because of a lack of understanding and appreciation of the differences in style and approach when individuals are faced with change in their workplace.

First steps first: the HR Team worked with their business partners and identified that there was a gap in knowledge for new managers and non-management employees. These employees had never taken personal development training which was resulting in a lack of skill in building positive interpersonal relationships with members, clients and employees.

The foundation of the new vision and strategy is that all employees will be leaders. At Coastal, leadership is not something that is connected to a management position – everyone from the CEO to the frontline employee is a **Leader!**

To ensure that all employees were supported to be leaders, a fast track, interpersonal communication and leadership development program became a critical need.

The Solution

The business world tells us that the recipe for building a high-performance learning organization where everyone is engaged is to develop leadership at every level in the organization. It is also widely accepted that to become an effective leader an understanding of self is paramount to developing positive relationships with others.

Drawing from her expertise in leadership development, organizational learning and conflict resolution, Deborah Lang AVP, Organizational Development designed a leadership development strategy that would address all of the elements required to build leaders at all levels of the organization. Four Mastery Levels were identified:

1. Leading Self
2. Leading Others
3. Leading Departments
4. Leading Organizations

Deborah could see the benefits of implementing the Insights Discovery™ system as a corporate-wide personal development program that supported all employees to be leaders by understanding themselves and respecting the differences in others. Using the Insights Discovery™ system would also build on the foundation that was created during the merger.

Looking at the big picture, the HR Organizational Development (OD) team could see that the Insights Discovery™ system was robust and simple to understand for all employees and would provide alignment to the primary theme of Coastal's vision:

"Leaders in building relationships.... one conversation at a time."

It was strongly believed that the Insights Discovery™ system would provide a solid foundation for building strong relationships and leaders. To test the water, Insights was used as the foundation of a pilot project – the Sales Champion Program.

Sales Champion Pilot Program: A Sales Champion Pilot Program was implemented to four retail branches (80 staff). Insights Personal Effectiveness workshops were delivered prior to the sales training. The recognizing type strategies supported front-line employees to adapt their style to others and develop deeper relationships with members.

The success of using Insights Discovery to support service delivery employees to build stronger relationships with members, quickly gained the buy-in and approval of an executive sponsor. Bruno Dragani, Chief People and Administration Officer provided executive sponsorship to implement the Insights Discovery™ system to the entire organization – our leadership development solution for 2010.

Insights Personal Effectiveness Workshops: Insights Discovery Personal Effectiveness-Recognizing Type workshops have been introduced to approximately 60% of the organization which has resulted in a true tipping point - 11 retail branches, two insurance agencies and six support departments for a total of 251 employees in 2010.

Insights Team Effectiveness Workshops: In June and July of 2010, the Insights Understanding Team Culture and Transforming Team Culture modules were delivered to Departments that had gone through restructuring.

Transformational Leadership Launch Pad Workshop: In June of 2010, the Insights Transformational Leadership Launch Pad was delivered to a select number of senior leaders and the Insights Transformational Leadership Book was used as a learning resource.

Employee Performance and Recognition Workshops: In June of 2010, a Performance Management training workshop was delivered to 109 Managers and the Insights Discovery D-4 Feedback Model was used as the primary model.

Insights Transformational Leadership Workshop: In October of 2010, Insights Vancouver President, Joyce Gwilliam delivered the Insights Transformational Leadership Workshop to Coastal's Executive Team.

New Organizational Competencies: Focus Groups were conducted in June of 2010 to gather ideas from employees on what Coastal's organizational competencies should be in order to achieve the new vision. The Insights Transformational Leadership (ITL) Reference Book was helpful in developing the descriptions of the new organizational competencies.

Learning Conversations Mini-Workshop: The first Learning Conversation mini-workshop was delivered in 2010 using the Simply Connect model. Recognizing when a conversation has gone off track and knowing how to re-connect by empathizing, listening, speaking our minds and seeking agreement assists employees to build relationships.

Critical Incident HR Support: A full understanding of how we react in a crisis and how others may react differently assists all employees to communicate to others in a supportive way during and after a crisis. Coastal uses the G-UIDE Model to support employees and teams that were experiencing stress as a result of a critical incident.

Success Factors – How did we make it work?

Coastal Community had experienced a lot of success using the Insights Discovery™ system during the merger of the three credit unions (2005) and in response to organizational conflicts and critical incidences (2007-2009). The successes of the past contributed to buy-in at a lot of different levels in the organization, demand to deliver Insights was huge.

To ensure that Coastal would be able to deliver the Insights Personal Effectiveness workshop to the entire organization, a decision was made to accredit two more employees as facilitators in Insights Discovery™- Coastal now has five in-house facilitators.

Another challenge for Coastal was how to deliver Insights to the business units without disrupting the business. We were not going to close down a branch to deliver the training to the team - and - we wanted the team to connect with each other! The branches and agencies were divided into equal parts and the Insights workshops were delivered over a two to three day period. The entire team was then brought together for two to three team activities prior to the opening of the branch/agency.

Sustaining the Learning - How will we sustain the success?

A key factor in sustaining the learning at Coastal is that the Insights Discovery™ models are being woven into everything we do in the corporation. Over the past year, every time we draft a communication or deliver soft skills training we select an Insights model, workbook or activity to connect employees to the language of Insights. Three examples are:

1. CEO's Announcement-New Organizational Structure: *4-P's of Communication Model*
2. Managers Performance and Recognition workshop: *D-4 Feedback Model*
3. Employees Learning Conversations mini-workshop: *Simply Connect Model*

Another factor that supports Coastal in sustaining the learning and fast tracking the development of leaders at all levels is that we have now reached the tipping point, a critical mass has been surpassed and everyone is talking the Insights language.

The Tipping Point....

It takes time to change old habits, create a cultural shift and experience tangible results. The Insights Discovery™ system has provided the foundation for employees to develop a deep self-awareness that supports them to interact effectively with others. Insights Discovery™ has now been rolled out to approximately 60% of the organization which has resulted in a true "tipping point".

The Results!

- **In 2010 Coastal Community became one of Canada's Top 50 Employers!**
Coastal focuses on improving the employee experience by creating an employee driven culture where employees take ownership in developing and nurturing the Coastal Culture. The Hewitt Top 50 Employee Engagement survey is the only employee driven survey where the results are determined by the employees.
- The Chief People and Administrative Officer championed the use of the Hewitt Top 50 Employer survey for the past three years and our engagement scores have shown improvement over the past three years. Coastal's engagement score was 61% in 2008, 63% in 2009, and the engagement score soared to 71% in 2010.
- Insights Discovery Workshop Evaluations reported that 66.7% of participants strongly agreed that they learned how to communicate more effectively with others as a result of the training.

Sustaining the Results - Next Steps

The leadership development solution for 2011 will consist of four parts:

1. Complete the implementation of Insights Personal Effectiveness-Recognizing Type workshops to the entire organization by March 2011.
2. Implement four-five of the Emerging Leadership Modules – Public Offerings:
 - 2.1. Effective Communication
 - 2.2. Giving and Receiving Feedback
 - 2.3. Recognizing Type
 - 2.4. Understanding and Transforming Team Culture
3. Implement Transformational Leadership Modules aligned to the new Coastal organizational competencies (to be determined in January of 2011)
4. Explore possibilities of using the Insights Navigator Transformational Leadership Profiles – a 360 Leadership Development tool.

Coastal's Lessons Learned

Build Alignment to the Corporate Vision. Insights Discovery™ system is strategically aligned to the corporate vision and strategy and imbedded into our corporate messaging, change management plans, leadership development initiatives, performance management systems, employee development programs, and career and succession planning initiatives.

Secure Executive Sponsorship and In-house Expertise. Support of our Executive Sponsor, Bruno Dragani, Chief People and Administration Officer was critical to delivering Insights across the organization – five in-house facilitators made the dream a reality.

Create a Solid Foundation of Success. At Coastal we believe in the creation of a solid foundation by building on what we have already done – our successes. Staying the course by offering the Insights Discovery™ system to all employees has provided a common language for all employees and a foundation for leadership at all levels of the organization.

Build strong relationships between the HR Team and the Business Partners. At Coastal, our HR Team builds strong relationship by working collaboratively with business partners to ensure that learning solutions fit the business need and that the implementation plan meets the operational requirements of “running the business”.

Integrate Insights into the fabric of the organization – At Coastal, the Insights Discovery™ system is woven into everything we do in the organization. On the employee development front - we integrate Insights into all of our learning solutions by using Insights Profiles, Models, Worksheets, and Activities. On the corporate front Insights is integrated into every corporate message and change management strategy – we use the power of the 4-P's of Communication to become “*leaders in building relationships*”!

Coastal Community's Insights Discovery Accredited Facilitators:

- Bruno Dragani, Chief People and Administrative Officer
- Deborah Lang, AVP Organizational Development
- Deborah Edwards, Manager, Employee Development
- Michelle McFarlane, HR Advisor, Performance and Succession
- Sheri Gauthier, HR Advisor, Education and Recruitment