Culture is Key

Annette Matthies, CHRO
Jay Champion, COO

elevationscu.com/baldrige
@ECUBaldrige
Baldrige Beginnings
## Key Cycles of Learning

<table>
<thead>
<tr>
<th>Before</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission, vision, values stale and not known</td>
<td>Living the values and added Employee Value Proposition</td>
</tr>
<tr>
<td>Employee Engagement scores flat and no market benchmarks</td>
<td>Employee Engagement score increasing annually</td>
</tr>
<tr>
<td>Training not consistent throughout the organization</td>
<td>Generalized, specialized and leadership training</td>
</tr>
<tr>
<td>Talent hired quickly to keep time to fill down</td>
<td>Long term focus on talent (#, future skills, mission critical positions)</td>
</tr>
</tbody>
</table>
## Baldrige Results

### 78% of Employees Engaged

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>69%</td>
</tr>
<tr>
<td>2011</td>
<td>73%</td>
</tr>
<tr>
<td>2012</td>
<td>73%</td>
</tr>
<tr>
<td>2013</td>
<td>77%</td>
</tr>
<tr>
<td>2014</td>
<td>78%</td>
</tr>
</tbody>
</table>

- **85+: Stellar/Exceptional**
- **75-84: Very Good/Great**
- **65-74: Good/Solid**
- **55-64: Fair/Mediocre**
- **45-54: Yellow Flag**
- **<45: Red Flag**
Key Reflections on the Journey

- **BEGINNER**
  - Invigorating our Culture

- **INTERMEDIATE**
  - Differentiating Through Training

- **ADVANCED**
  - Nuturing Talent

- **EXPERT**
  - Growing Leaders
Member-Centric Strategy

- Member Loyalty
- Member Centricity
- Financial Sustainability
- High Performance Culture
Or How We Went From This...
To This
Invigorating our Culture

GREEN / BEGINNER
Pete
VP EPEX

core purpose
- We provide solutions for a better life.

vision
- We dominate the market while elevating the success of our members and business partners
- We have changed the way consumers and businesses bank
- We are known for the good work we do in the community
- We are sought out as THE preferred employer

BHAG Big Hairy Audacious Goal
- We will win the Malcolm Baldrige National Quality Award!

core values
integrity
- We build trust through honest and ethical actions

respect
- We treat each other with dignity and value individual differences

passionate
- We are enthusiastic in everything we do

creativity
- We foster an environment of innovation and learning

driven by excellence
- We always seek to improve and strive to exceed expectations
The Culture

This will be the best place you’ve ever worked!
We Promise You Will

- Be part of a winning team
- Do worthwhile work
- Be empowered to make decisions
- Have a career, not a job
- Have servant leadership

elevationscu.com/careers
We Expect You To:

- believe your behavior matters
- give 100% effort and zero excuses
- be flexible and fluid
- have work life fit
- continuously learn

elevationscu.com/careers
We take our fun seriously
We’re in the community - in a big way
Volunteering is a big part of who we are.
Differentiating through training
BLUE / INTERMEDIATE
Training Needs Identified

Our training and orientation programs prepare employees to be effective

Percentage who agree with this statement

- 2011: 66%
- 2012: 58%
- 2013: 45%
- Benchmark: 79%
Service Values Pocket Card

THREE STEPS OF SERVICE
1. I offer a warm and sincere greeting, using the member’s name. I anticipate and attend to human needs.
2. I anticipate and fulfill each member’s business needs.
3. I offer a warm and sincere farewell, using the member’s name. I reconnect on a human level.

CORE PURPOSE
“We provide solutions for a better life.”

VALUE PROPOSITION
We build long term relationships and deep mutual trust with our members by acting in the best interest of our membership and community.
Retail Business Plan

Elevations Credit Union
Click – Talk – Walk: Providing Solutions
October 1, 2013
“MONSTERS, INC.” Training Facility

Mock Branch 2.0

Hands-on Systems
## Training Improvements

<table>
<thead>
<tr>
<th>Questions</th>
<th>Overall Change from 2013 to 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Our orientation program prepares new employees to be effective.</td>
<td>33%</td>
</tr>
<tr>
<td>I am provided the training I need to be effective in my job.</td>
<td>20%</td>
</tr>
<tr>
<td>Issues of low performance are addressed in my workgroup.</td>
<td>12%</td>
</tr>
</tbody>
</table>
Targeted Selection

Knowledge
Experience
Competencies
Motivational Fit
Success Profile
Branch Manager

The Branch Manager directs a Branch while seeking to increase and develop an organization. They must ensure the Branch is compliant with established standards and implement strategies to improve Branch performance. They ensure the Branch is an essential part of the credit union's operations by fostering a culture that inspires a culture of customer service.

Key Actions:
- Delivers clear messages—Conveys messages logically, succinctly, and at the right pace; delivers results.
- Communicates challenges to others; uses feedback to improve.
- Uses language clearly and concisely.
- Ensures understanding of different ways of thinking.
- Conveys a positive, professional, and respectful demeanor.

Reports to:
- Community Market Manager

Education:
- Bachelor's degree
- Formal leadership and sales training

Knowledge, Experience & Skills:
- 2-5 years of similar or related experience
- 5+ years' experience as a Branch Manager
- 2-4 years' experience as a Branch Manager
- Passion and ability to coach
- Excellent management, communication, and customer service skills

Prerequisite Courses:
- Communicating for Leadership Success
- High-Impact Communication

Course Name: Coaching for Peak Performance
Status: Active
Description: This course helps leaders handle both proactive and reactive coaching discussions. By understanding the importance of three coaching techniques, learners can have more effective and efficient interactions. The session incorporates a fast-paced activity to help learners understand the techniques and see how they can be useful in the workplace. Since both proactive and reactive coaching discussions can be challenging, participants will use their own situations to make the course relevant for each individual.

Prerequisite Courses: Communicating for Leadership Success
Course Code: CPPTL
CEU: 0
Cost to Learner: $0.00
What we’re working on now

My supervisor takes an interest in helping me advance my career

<table>
<thead>
<tr>
<th>Year</th>
<th>Elevations</th>
<th>Benchmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>55%</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>105%</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
If you love where you live, it matters where you work.
Après Ski

We’d love to share more, please ask!

elevationscu.com/baldrige
@ECUBaldrige