
THE LEADERSHIP CHALLENGE results

Technology Credit Union Weaves The Leadership Challenge® into Corporate Culture

At Technology Credit Union (Tech CU), like at all solid financial institutions, ROI is the predominant thread of the cultural fabric. That is why, when its Corporate Training Department wanted to incorporate The Leadership Challenge (TLC) into that fabric, the pitch was TLC's potential positive impact on the achievement of the company's core mission – excellence in member customer service.

It was an easy sell.

Founded in 1960 out of a cafeteria conversation between employees of Fairchild Camera and Instrument Semiconductor Division, Tech CU now has 265 employees and nine branches in the Silicon Valley, with plans to add to those numbers in short order. The company's primary business is providing full-service banking to technology-related companies and their employees.

Members of Tech CU's Corporate Executive Team were turned on to The Leadership Challenge at a public workshop (sponsored by Sonoma Learning Systems) in Fall 2005. Convinced that TLC could help their already successful company continue to flourish, a plan of attack was put into place by the Corporate Training team.

At the January 2006 launch, Barry Posner was the keynote speaker. He signed a copy of *The Leadership Challenge* for each manager and led a 50-minute dialogue about lessons for leaders – setting the tone and atmosphere for knitting TLC into Tech CU's corporate culture.

Next came TLC content on the company's intranet site (naturally – it is TECHNOLOGY Credit Union, after all!) – resources, links to The Leadership Challenge website, information about the Leadership Practices Inventory (LPI), and a calendar of TLC events at Tech CU.

To “Model the Way,” top executives went through the

TLC workshops first. Two small group sessions were held so corporate decision-makers could go through the LPI and decide what TLC-related outcomes were desired (the ROI discussion). It was determined that ensuring that the management staff was fully equipped to manage would directly impact the company's bottom line – via less turnover, longer employee tenure, and better morale – connecting the dots to improve service to credit union members.

CEO Ken Burns followed up his initial TLC experience with small group luncheons with his managers, getting their feedback about how TLC was going to help all of them (himself included). This helped employees really experience the company's commitment to leadership development. The Board of Directors gave its blessing as well.

The larger management team came next, with sessions off-site to maximize attention-spans and minimize interruptions. Using information from a recent internal survey that highlighted areas of

“breakdowns” between levels of managers, the TLC process was used to identify trouble spots. Bosses and direct-reports were not in the same sessions, so no self-censorship was necessary. Feedback for the set-up was excellent, with participants citing that they enjoyed everyone being at the same level during the training, with “no silos or grandstanding by title.”

“The dialogues that have occurred as a result of The Leadership Challenge have opened up many, many good discussions in our organization,” said Michelle Greear, Corporate Training Manager. “The value has been unbelievable.”

The LPI was part of the sessions, and while the normal feelings of intimidation and fear were present, feedback was overwhelmingly positive regarding the results. Many expressed a desire to continue the process, so the Corporate Training Team invited some of the more vocal managers to a brainstorming meeting about how to keep TLC alive at Tech CU.

As a result, a reading series was implemented. A copy of “Encourage the Heart” was given to participants and small group sessions were held over six weeks to discuss the text and how to apply it in daily practice.

More evidence that TLC is truly woven into their cultural fabric: Greear has a copy of *Credibility* on her

nightstand, “and a poster of The Five Practices and Ten Commitments’ in eyeshot of my desk at work.” Greear and her staff work daily to incorporate TLC components into all correspondence and communication with employees.

Next steps for Tech CU and TLC include a reading series about innovation and a follow-up survey to assess what, if any, progress managers have made in their leadership development.

As to the ROI, quantitative surveys will be used to assess credit union members to see if service has improved as a result of better managers and happier employees. A survey conducted in the midst of TLC training showed a significant increase in member satisfaction, so the further research will be used to validate that trend and possible TLC correlation.

Bottom line – good leadership equals good business.