

Employer Branding

Shifting the Culture

Janet Grantham

Sydenham Community Credit Union

- \$140 million in assets, 8900 members
- 5 branches located in Southwestern Ontario
- Small town rural focus – heavy concentration in agriculture
- No HR manager/departement
- Training position added in 2008

Mission

We are a member owned financial services partner committed to delivering valued products and service that:

Enhance member loyalty

Drive profitable growth

Strengthen our community roots



Internal Brand

- Employee Ownership/Engagement
- Employee understanding and commitment to their role in the overall success of the credit union
- Needs to be tied to external brand and customer base
- Acts as a guide for employees in everything they do

Shifting the Culture

- In existence for over 50 years
- Process started in 2004
- Change in CEO
- Previous CEO – very autocratic
- Disengaged workforce

Strategic Plan

- Employer of choice
- Employee ownership/engagement
- Organic growth based on service
- ERM – Human Resource Risk

Action Plans

- Full review of human resource policies and procedures with a focus on the performance management system
- Employee training particularly in the area of sales and service
- Assessment of employee and member engagement
- Communication Plan

Performance Management Action Plan

- Full salary review
- Job descriptions
- Performance Review Plans
- Quantitative Assessment Tools
- Restructured Bonus Program
- Behavioural Competencies

Salary Review

- External consultant
- Process communicated to all staff
- Job grades reviewed by a staff committee
- Results communicated to all staff
- New salaries and ranges reviewed annually with each staff member
- Critical factor in employee engagement

Job Descriptions

- Complete re-write for all positions
- Increased focus on member service and sales
- Expectations clearly communicated
- Reviewed by staff and changes made

Performance Review Plans

- Directly tied to job description
- Detailed information on service and sales targets
- Includes results of 360 reviews and members surveys
- Section on ownership and engagement
- Completed semi annually including a review of behavioural competencies

Quantitative Assessment

- Process must be viewed as fair by all employees
- Focused on removing as much qualitative assessment as possible
- Living document – constantly evolving
- Measurement Grid – merit increases
- Evaluation Summary – bonus calculation

Training Action Plan

- Computer based Sales and Service Training supported by in branch sales meetings
- Training plans and budget for each employee
- Training credits
- Management training in coaching and communication
- Behavioural Competencies
- Product Knowledge

Sales and Service

Year One

- 12 modules completed on-line
- Supported by monthly staff meetings
- Final exam – 85% passing grade

Years Two and Three

- Monthly staff meetings

Year Four

- Monthly meetings with Training Manager

Training Plans

- Career Planning
- Identification of resources required
- Focus on retaining good employees and promoting from within
- Human Resources Risk – shortage of skilled workers
- Critical to Employee Engagement

Training Credits

- Intended to create a culture of continuous improvement
- Requirement assigned by job
- Includes community involvement
- Engaged employees embraced the program
- Disengaged employees very resistant

Management Training

Centered on supporting our programs

- Coaching
- Sales and Service
- Performance Management
- Monthly Meetings
- Behavioural Competencies

Behavioural Competencies

Adaptability to Change
Building Relationships and Partnerships
Change Leadership
Customer Service Orientation
Listening, Understanding and Responding
Results Orientation
Team Leadership
Teamwork and Cooperation
Conceptual Thinking
Concern for Order, Quality and Compliance

Developing Others
Holding People Accountable
Impact and Influence
Information Seeking
Initiative
Organizational Awareness
Planning, Organizing and Coordinating
Problem Solving and Judgement
Self Confidence
Strategic Orientation

Product Knowledge

- Annual testing on line – in specific areas and overall knowledge
- Embraced by engaged employees resisted by the disengaged
- In branch training – previously handled by Branch Managers and CMT, created a Training Manager position in 2008

Employee Engagement Action Plan

- Bi-annual Employee Surveys
- Staff Committee
- Issues become KPA for branch, corporate and senior management
- 360 reviews by/for all employees including CEO
- Syd Quid

Communication Action Plan

- Identified as a key issue in employee survey – directly and indirectly
- Staff committee
- Increased access to Corporate and Senior Management
- Significant resources invested in our internal website

Final Thoughts

- Ongoing process
- Number of disengaged employees has declined significantly
- Majority of employees moved to the new culture
- Behavioural testing on all new employees
- Hiring practices are more defined
- Psychological assessments on potential managers

Thank You

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