



## Case Study: Meridian Credit Union - Barrie Branch

### SYNOPSIS:

During this time, the branch was under the strain of staff changeover including a new manager and assistant manager. Morale was low, stress was high and member satisfaction a low 47 out of 100 (net promoter.)

Based on the intervention and coaching, this team reported that there was more communication and more understanding of each others roles with a better appreciation of seeing things from others perspectives.

The generalized outcome: strong positive leadership has helped the team grow their trust in each other, respect and consideration of another's time has increased significantly. Through clear understanding of roles and responsibilities, the team is functioning on a higher level productivity and positivity.

During these tough financial times the Barrie branch still maintains a happy atmosphere and are willing to help not only its members also the community as a whole.

### CLIENT PROFILE:

Membership based Credit Union reinventing neighborhood banking around Ontario, Canada

**INDUSTRY:** Financial Institution

**LOCATION:** branch located in City of Barrie pop. 125,000 - largest branch north of Toronto & the original Credit Union in Barrie

**TEAM TYPE:** Entire staff at the branch

**TEAM SIZE:** 16

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### SITUATION:

- Team avoided conflict. There was a need for conformity - harmony - the environment didn't value diversity.
- Trust issues were apparent due to excessive staff turnover. Staff worked independently. There was no sense of team.
- Staff did not understand roles and responsibilities. Thus there was little cross-functionality.
- The staff was not stepping into their own leadership as individuals nor as members of the team. Leadership development was adhoc until this point. Leadership was not understood.
- Gallup Consulting's Q12 Employee Engagement scores were low. The team was deficient of energy and volunteerism.
- The atmosphere was not conducive to collaboration. Respect for each others time was seen to be essential yet not understood.
- No risk taking.

## APPROACH:

- A Discovery Session with the Manager followed by a short questionnaire to determine specific needs, wants, and quantitative and qualitative results projections.
- Deployment of the online Team Diagnostic Assessment - excellent for its anonymity.
- A one day coaching facilitation on-site with systems coaches to review the results of the assessment and uncover the team issues. A safe space for issues to be aired and solutions discussed without the team members feeling it was personal. New perspectives were realized with a hugely impactful discovery of each others differences and view of things in their working day. Planned exercises and activities were used to create the environment of trust, respect, and open conversation. Team agreements were developed to align with and move forward into their work life. The final outcomes were established, documented and tasks assigned.
- Five months later: a three hour team coaching session discovered the need for a further opportunity for deeper discussion and understanding another's opinion. Challenges continue to be met and overcome by using the tools & skills learned in the on-site earlier.
- One year later: numbers came out from the Meridian's favored measurement analysis - Net Promoter (member feedback) and Gallup (Q12) demonstrating quantitative results.

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## 12 MONTHS LATER:

The Barrie branch had a net promoter score (based on member feedback taken weekly) of 47 at the end of 2008. They finished Mar '09 with a 55.5%. As of Apr '09, Meridian's province-wide average is 60%, the Barrie branch now ranks just above the average at 62%.

In the Manager's words; "*we're striving to CONSISTENTLY maintain the 60's before we embark on our journey to the 70's. Our team strategy is simple SCORE 4 MORE. The goals we set build under best practices of 1. KNOWLEDGE, 2. Be PROACTIVE, 3. Be CONSISTENT 4. QUALITY ADVICE. We are now leveraging on success stories under these categories.....early signs are that it's working....*"



## THE TEAM REPORTED:

- *Gallup Consulting Q12 Employee Engagement Results Jan 2009*
- 18.5% increase in the team's opportunities at work to learn and grow
- 10.3% increase in employee's feelings encouragement of development at work
- 7.7% jump in people taking an interest in someone's progress at work
- Team showed increased trust with each other exhibiting more patience, transparency and improved communication
- Team uses conflict engagement tools and a more effective problem solving process. Fewer issues are being escalated to the Manager
- They have experienced tremendous increase in awareness of self, others; their roles and the impact on the team
- Team commitment to results, to business goals and to positive resolution of issues has increased significantly
- Staff is more satisfied at work, are less stressed and customer service has improved
- Diversity is growing more acceptable.